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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.
Dear Friends,

The Promise of Chautauqua is Chautauquans. You, as Chautauquans, engage others with your ideas and eagerly take ideas away from your encounters in ways uncommon to your daily routines ‘back home.’ You demonstrate with others a level of civil discourse that brings people toward solutions and serves as a model for other communities. You embrace a pattern of inclusivity that leaves no one out and pursue lifelong learning as part of a community in which innovation is expected and welcome. You sustain for us and future generations that which is precious to the idea and place that is Chautauqua.

As the Chautauqua Foundation has introduced this concept of promise over the past three years, we have been driven by the idea that we as a society would be better off if more people embraced these values, indeed if there were more Chautauquans. In partnership with the Board and staff of the Institution we have understood that to deliver on this promise we need to ensure that the experience which all have here is of the highest quality that the Institution and the community can deliver.

At the end of our last fiscal year, and early in this calendar year, the Foundation, with the Institution, launched The Promise Campaign. The Campaign seeks to raise $98.2 million to be invested across the Institution’s people, program and facilities to deliver an even better experience. The Campaign embraces annual growth in the Chautauqua Fund, additional endowment for scholarships, our artistic and program leadership and their programs, and the rehabilitation of the Amphitheater and Bellinger Hall. These priorities must be fulfilled if we are to flourish in the years ahead as we have over these past several decades.

The Promise of Chautauqua is Chautauquans. Many of you have responded with extraordinary generosity in this last year and the two earlier ones that constituted the lead gift or “private” phase of the Campaign. In this past year the Institution received the largest commitment ever made to Chautauqua through a $10 million gift

<table>
<thead>
<tr>
<th>Unspecified Endowment</th>
<th>Bellinger Hall</th>
<th>The Lake, the Grounds, and Public Spaces</th>
<th>Chautauqua Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal: $15.65 million</td>
<td>Goal: $5.5 million</td>
<td>Goal: $6.25 million</td>
<td>Goal: $22 million over the life of the campaign</td>
</tr>
<tr>
<td>Committed: $15.7 million</td>
<td>Committed: $0</td>
<td>Committed: $5.7 million</td>
<td>Committed: $11.3 million</td>
</tr>
</tbody>
</table>

Committed amounts above are as of March 31, 2014.
for the rehabilitation of the Amphitheater. In calendar year 2013, the Chautauqua Fund set a new record for the amount donated and as you will note later in this report, our permanent endowment, powered by over $3 million dollars of new receipts and another strong year of investment performance, reached $75 million at the end of the fiscal year in March of 2014. We are grateful to all those whose names are found in this report and the list we published in the winter edition of The Chautauquan for delivering on The Promise. We are proud to report to you we accomplished all this and reduced our cost of fundraising to only 6.43 cents on the dollar averaged over the past three years.

Chautauquans also keep the Promise through their volunteer work. The Foundation’s Board continues to lead with vision and hard work. This past year John Corry and Hale Oliver left the Board and we thank them for their service. We welcomed Cathy Bonner and Bill James and look forward to their contributions to our work which are evident already in their first few months on the Board. We have recruited 40 volunteers to join the 100 who work on behalf of the Chautauqua Fund to reach out to the community to discuss how individuals might participate in Meeting Chautauqua’s Promise. We work closely with our friends on the Institution Board of Trustees who hold fiduciary responsibility for the future of the Institution. To all of these people, and to you, who are the Promise, we extend our thanks.

We also take note of the staff of the Foundation who have worked hard and effectively to achieve the progress of these past years. Together we build on the legacy of those who preserved this Institution for our benefit and we fulfill Chautauqua’s Promise for those who have yet to have the privilege to call themselves Chautauquans.

Sincerely,

Steven W. Percy, Chairman

Geof Follansbee, Chief Executive Officer

Chautauqua’s Amphitheater
Goal: $33.5 million including endowment for maintenance
Committed: $15 million

Endowed Scholarships
Goal: $2 million
Committed: $956,000

Leadership Endowment
Goal: $2.5 million
Committed: $1 million

Program Enhancements and Innovation
Goal: $8 million
Committed: $8.2 million

Hagen-Wensley House
Completed: $2.8 million
Total Philanthropic Activity

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 ended March 31, the Chautauqua Fund operates on a calendar year. During the 2013 calendar year, the Fund raised $3,600,669. 86% of this amount was from the Bestor Society and 1874 Society members. The success of the Fund depends upon nearly 140 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 7.7% of the amount raised for the fiscal year ended March 31, 2014.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Chautauqua Fund</th>
<th>Endowment</th>
<th>Capital &amp; Other</th>
<th>Total</th>
<th>Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$3,563,728</td>
<td>$7,816,690</td>
<td>$14,356,124</td>
<td>$25,736,542</td>
<td>2,952</td>
</tr>
<tr>
<td>2013</td>
<td>3,514,364</td>
<td>12,054,029</td>
<td>2,469,254</td>
<td>18,037,647</td>
<td>3,185</td>
</tr>
<tr>
<td>2012</td>
<td>3,566,002</td>
<td>4,702,872</td>
<td>2,241,781</td>
<td>10,510,654</td>
<td>3,351</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>
<td>3,273</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>
<td>3,353</td>
</tr>
</tbody>
</table>

The charts above represent total philanthropic activity, which includes new cash gifts, new planned gifts, and pledges recorded during the most recent five fiscal years (in thousands).
New pledges and planned gift intentions, when combined with the previously stated intentions of donors, create a pool of future assets in excess of $47.2 million as of March 31, 2014. These assets grew by $5.2 million during the fiscal year. The discounted value of unconditional contributions receivable recorded in the financial statements was $8.3 million as of March 31, 2014. 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. Members are listed on pages 42 and 43.

<table>
<thead>
<tr>
<th>Unconditional contributions receivable</th>
<th>Specified</th>
<th>Unspecified</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 2,286,921</td>
<td>$ 12,884,820</td>
<td>$ 15,171,741</td>
<td></td>
</tr>
<tr>
<td>20,018,054</td>
<td>12,022,568</td>
<td>32,040,622</td>
<td></td>
</tr>
<tr>
<td>$ 22,304,975</td>
<td>$ 24,907,388</td>
<td>$ 47,212,363</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conditional contributions receivable</th>
<th>Specified</th>
<th>Unspecified</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 16,809,147</td>
<td>$ 8,920,818</td>
<td>$ 25,730,965</td>
<td></td>
</tr>
<tr>
<td>8,920,818</td>
<td>434,939</td>
<td>9,355,757</td>
<td></td>
</tr>
<tr>
<td>5,875,718</td>
<td></td>
<td>5,875,718</td>
<td></td>
</tr>
<tr>
<td>$ 32,040,622</td>
<td></td>
<td>$ 32,040,622</td>
<td></td>
</tr>
</tbody>
</table>
Endowment Net Assets

The Foundation’s net assets were $83.5 million at the close of the fiscal year ended March 31, 2014, $8.2 million higher than reported at the beginning of the fiscal year. There were 676 active endowment funds as of March 31, 2014, representing $74.9 million of net assets. 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.

This chart represents the net asset balances of active endowment funds as of March 31, 2014 by area of support.

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.
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 $80.8 million in invested assets, comprised of the following portfolios:

1) Endowment ($75.1 million)
2) Temporarily restricted ($1.2 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. Investment performance is presented on a net basis, defined as total time weighted return after all investment management fees.

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 funds of hedge funds, Blackstone Alternative Asset Management and Pointer Management, LLC. The pooled life income fund is managed by Key Private Bank.

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 $60.7 million of the endowment and $14.4 million of the endowment is invested in the two funds of hedge funds. The endowment’s net return for fiscal year 2014 was 10.9%.

2) Temporarily restricted funds are held and managed separately from permanently restricted endowment in one of two portfolios, employing very conservative investment strategies. There was minimal return on the portfolio primarily held in cash and the return on the other portfolio was 1.4% for fiscal year 2014.

3) The management and investment strategy of the pooled life income fund (PLIF) is reviewed annually with Key Private Bank. At March 31, 2014, total PLIF assets were $3.7 million, invested 43% equity and 57% fixed income.

4) Funds held in custody for the Institution to meet the debt service for the Turner Community Center had a market value of $765,379 as of March 31, 2014. Assets are invested in a series of certificates of deposits.

This chart represents the endowment investment portfolio in thousands, which has grown by $32.4 million over the past ten years, from $42.7 million as of March 31, 2005 to $75.1 million as of March 31, 2014.

Endowment Investment Portfolio

80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0,000

Endowment Asset Allocation 2014

Total endowment market value as of March 31, 2014 and 2013 was $75.1 and $66.9 million, respectively. As of March 31, 2014 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, 2014, the Endowment earned an annualized 6.2% return, net of fees, surpassing the annual results of the diversified benchmark, 6.0%. This benchmark is net of fees and is diversified based on the strategic allocation of the Russell 3000, MSCI EAFE, HFR Strategic and BarCap Aggregate Bond indices. The benchmark is currently weighted 30% Russell 3000, 30% MSCI EAFE, 20% HFR Strategic and 20% BarCap Aggregate Bond.
$83,493,415
The Foundation’s net assets as of March 31, 2014

$25,736,542
Total philanthropic dollars committed during fiscal year 2014

2,952
Total number of unique donors who made a gift to the Chautauqua Fund, endowment, or capital and other during fiscal year 2014

676
Number of active endowments held by the Foundation as of March 31, 2014

7.7%
The Foundation’s five year average cost of fundraising as a percentage of total philanthropy

43%
Fiscal 2014 increase in total philanthropy over the previous year
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, 2014 and 2013, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

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

Auditors’ Responsibility
Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors’ judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity’s preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity’s internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

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

Opinion
In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Foundation as of March 31, 2014 and 2013 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 16, 2014
## Statements of Financial Position

**March 31,**

**Assets:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$466,584</td>
<td>$556,594</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>8,324,855</td>
<td>8,040,538</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>77,371,168</td>
<td>69,201,601</td>
</tr>
<tr>
<td>Property and equipment, net (Note 4)</td>
<td>49,915</td>
<td>59,690</td>
</tr>
<tr>
<td>Other assets</td>
<td>361,973</td>
<td>358,271</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>$86,574,495</strong></td>
<td><strong>$78,216,694</strong></td>
</tr>
</tbody>
</table>

**Liabilities and Net Assets:**

**Liabilities:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable to the Institution for program support (Note 5)</td>
<td>$2,064,795</td>
<td>$1,957,423</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>250,906</td>
<td>232,658</td>
</tr>
<tr>
<td>Amounts held in custody for others (Note 6)</td>
<td>765,379</td>
<td>757,209</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>3,081,080</strong></td>
<td><strong>2,947,290</strong></td>
</tr>
</tbody>
</table>

**Net Assets (Note 7):**

<table>
<thead>
<tr>
<th>Description</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>(149,276)</td>
<td>(806,396)</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>16,360,502</td>
<td>11,884,120</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>67,282,189</td>
<td>64,191,680</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>83,493,415</strong></td>
<td><strong>75,269,404</strong></td>
</tr>
</tbody>
</table>

**Total liabilities and net assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td><strong>$86,574,495</strong></td>
<td><strong>$78,216,694</strong></td>
</tr>
</tbody>
</table>

See accompanying notes.
For the year ended March 31, 2014

<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>Revenues and gains:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>$ 3,563,728</td>
<td>$ -</td>
<td>$ 3,563,728</td>
</tr>
<tr>
<td>Endowment</td>
<td>-</td>
<td>603,921</td>
<td>2,801,429</td>
<td>3,405,350</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>-</td>
<td>129,682</td>
<td>289,080</td>
<td>418,762</td>
</tr>
<tr>
<td><strong>Total contributions</strong></td>
<td>-</td>
<td>4,297,331</td>
<td>3,090,509</td>
<td>7,387,840</td>
</tr>
<tr>
<td><strong>Interest and dividends</strong></td>
<td>-</td>
<td>1,138,684</td>
<td>-</td>
<td>1,138,684</td>
</tr>
<tr>
<td><strong>Net realized and unrealized gains</strong></td>
<td>-</td>
<td>6,624,935</td>
<td>-</td>
<td>6,624,935</td>
</tr>
<tr>
<td><strong>Total revenues and gains</strong></td>
<td>-</td>
<td>12,060,950</td>
<td>3,090,509</td>
<td>15,151,459</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General and administrative</td>
<td>695,774</td>
<td>-</td>
<td>-</td>
<td>695,774</td>
</tr>
<tr>
<td>Support to the Institution:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>3,563,728</td>
<td>-</td>
<td>-</td>
<td>3,563,728</td>
</tr>
<tr>
<td>Program (Note 5)</td>
<td>1,822,775</td>
<td>-</td>
<td>-</td>
<td>1,822,775</td>
</tr>
<tr>
<td>Development (Note 6)</td>
<td>845,171</td>
<td>-</td>
<td>-</td>
<td>845,171</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>6,927,448</td>
<td>-</td>
<td>-</td>
<td>6,927,448</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions</strong></td>
<td>7,584,568</td>
<td>(7,584,568)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Change in net assets</strong></td>
<td>657,120</td>
<td>4,476,382</td>
<td>3,090,509</td>
<td>8,224,011</td>
</tr>
<tr>
<td><strong>Net assets - beginning</strong></td>
<td>(806,396)</td>
<td>11,884,120</td>
<td>64,191,680</td>
<td>75,269,404</td>
</tr>
<tr>
<td><strong>Net assets - ending</strong></td>
<td>$ (149,276)</td>
<td>$ 16,360,502</td>
<td>$ 67,282,189</td>
<td>$ 83,493,415</td>
</tr>
</tbody>
</table>

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

<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>Revenues and gains:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions:</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>$ 3,514,364</td>
<td></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</td>
<td>-</td>
<td>22,334</td>
<td>1,231,857</td>
<td>1,254,191</td>
</tr>
<tr>
<td>pledges, net of collections</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total contributions</td>
<td>-</td>
<td>3,693,966</td>
<td>8,723,643</td>
<td>12,417,609</td>
</tr>
<tr>
<td>Interest and dividends (Note 3)</td>
<td>-</td>
<td>1,027,134</td>
<td>-</td>
<td>1,027,134</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>-</td>
<td>4,431,710</td>
<td>-</td>
<td>4,431,710</td>
</tr>
<tr>
<td>Total revenues and gains</td>
<td></td>
<td>9,152,810</td>
<td>8,723,643</td>
<td>17,876,453</td>
</tr>
</tbody>
</table>

| **Expenses:**                  |              |                        |                        |           |
| General and administrative     | 624,718      | -                      | -                      | 624,718   |
| Support to the Institution:    |              |                        |                        |           |
| Chautauqua Fund                | 3,514,364    | -                      | -                      | 3,514,364 |
| Program (Note 5)               | 1,603,719    | -                      | -                      | 1,603,719 |
| Development (Note 6)           | 773,310      | -                      | -                      | 773,310   |
| Total expenses                 | 6,516,111    | -                      | -                      | 6,516,111 |

Net assets released from restrictions | 6,954,389 | (6,954,389) | - | -

Change in net assets | 438,278 | 2,198,421 | 8,723,643 | 11,360,342

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

Net assets - ending | $ (806,396) | $ 11,884,120 | $ 64,191,680 | $ 75,269,404

See accompanying notes.
For the years ended March 31,

### Operating activities:

<table>
<thead>
<tr>
<th>Description</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$8,224,011</td>
<td>$11,360,342</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>(6,624,935)</td>
<td>(4,431,710)</td>
</tr>
<tr>
<td>Depreciation</td>
<td>11,518</td>
<td>13,058</td>
</tr>
<tr>
<td>Changes in other operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>(284,317)</td>
<td>(1,229,676)</td>
</tr>
<tr>
<td>Other assets</td>
<td>(3,702)</td>
<td>(90,988)</td>
</tr>
<tr>
<td>Payable to the Institution for program support</td>
<td>107,372</td>
<td>165,992</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>18,248</td>
<td>(5,829)</td>
</tr>
<tr>
<td>Amounts held in custody for others</td>
<td>8,170</td>
<td>(231,003)</td>
</tr>
<tr>
<td><strong>Net operating activities</strong></td>
<td><strong>1,456,365</strong></td>
<td><strong>5,550,186</strong></td>
</tr>
</tbody>
</table>

### Investing activities:

<table>
<thead>
<tr>
<th>Description</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchases of property and equipment</td>
<td>(1,743)</td>
<td>(567)</td>
</tr>
<tr>
<td>Purchases of investments</td>
<td>(13,234,340)</td>
<td>(9,408,347)</td>
</tr>
<tr>
<td>Proceeds from sales of investments</td>
<td>11,689,708</td>
<td>3,576,527</td>
</tr>
<tr>
<td><strong>Net investing activities</strong></td>
<td><strong>(1,546,375)</strong></td>
<td><strong>(5,832,387)</strong></td>
</tr>
<tr>
<td><strong>Net change in cash</strong></td>
<td><strong>(90,010)</strong></td>
<td><strong>(282,201)</strong></td>
</tr>
<tr>
<td>Cash - beginning</td>
<td>556,594</td>
<td>838,795</td>
</tr>
<tr>
<td><strong>Cash - ending</strong></td>
<td><strong>$466,584</strong></td>
<td><strong>$556,594</strong></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 Foundation to concentrations of credit risk.

Investments:
Investments in marketable securities are stated at fair value as determined by quoted prices in active markets. Alternative investments include investments in partnerships whose holdings consist primarily of funds 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 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. 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 in the statements of activities. 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 $32,041,000 and $26,463,000 at March 31, 2014 and 2013.

Tax Status:
The Foundation is a 501(c)(3) corporation exempt from income taxes under Section 501(a) of the Internal Revenue Code. The Foundation believes it is no longer subject to examination by Federal and State taxing authorities for years prior to 2011.

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 16, 2014, the date the financial statements were available to be issued.
Reclassifications:
The 2013 financial statements have been reclassified to conform with the presentation adopted for 2014.

2. Contributions Receivable:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$2,286,921</td>
<td>$3,932,186</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>12,884,820</td>
<td>11,644,222</td>
</tr>
<tr>
<td>Less discount</td>
<td>6,846,886</td>
<td>7,535,870</td>
</tr>
<tr>
<td></td>
<td>$8,324,855</td>
<td>$8,040,538</td>
</tr>
</tbody>
</table>

Contributions at March 31, 2014 are expected to be received over the periods shown below:

- Less than one year: $3,259,046
- One through five years: $1,124,188
- Greater than five years: $10,788,507

$15,171,741

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

3. Investments:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketable securities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$2,847,938</td>
<td>$3,773,500</td>
</tr>
<tr>
<td>Equities</td>
<td>43,006,309</td>
<td>37,408,858</td>
</tr>
<tr>
<td>Fixed income securities</td>
<td>11,093,519</td>
<td>9,625,698</td>
</tr>
<tr>
<td>Alternative investments</td>
<td>20,103,382</td>
<td>18,067,235</td>
</tr>
<tr>
<td>Other</td>
<td>320,020</td>
<td>326,310</td>
</tr>
<tr>
<td></td>
<td>$77,371,168</td>
<td>$69,201,601</td>
</tr>
</tbody>
</table>

The Foundation has committed capital of approximately $13,980,000 to private equity alternative investments. The unfunded portion of the commitments total approximately $5,037,000 as of March 31, 2014.

Investment management fees of $587,312 and $472,406 for 2014 and 2013 are recorded in the statements of activities as follows:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees netted against interest and dividend income</td>
<td>$211,421</td>
<td>$156,563</td>
</tr>
<tr>
<td>General and administrative expense</td>
<td>375,891</td>
<td>315,843</td>
</tr>
<tr>
<td></td>
<td>$587,312</td>
<td>$472,406</td>
</tr>
</tbody>
</table>

4. Property and equipment:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</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>150,637</td>
<td>148,894</td>
</tr>
<tr>
<td></td>
<td>315,412</td>
<td>313,669</td>
</tr>
<tr>
<td>Less accumulated depreciation</td>
<td>265,497</td>
<td>253,979</td>
</tr>
<tr>
<td></td>
<td>$49,915</td>
<td>$59,690</td>
</tr>
</tbody>
</table>

5. Distributions to the Institution:

Amounts payable for program support at March 31:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income and principal</td>
<td>$1,736,849</td>
<td>$1,603,719</td>
</tr>
<tr>
<td>Income from prior periods</td>
<td>327,946</td>
<td>353,704</td>
</tr>
<tr>
<td></td>
<td>$2,064,795</td>
<td>$1,957,423</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>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income from permanently restricted endowments</td>
<td>$1,679,775</td>
<td>$1,476,843</td>
</tr>
<tr>
<td>Income and principal from temporarily restricted gifts and other funds</td>
<td>143,000</td>
<td>126,876</td>
</tr>
<tr>
<td></td>
<td>$1,822,775</td>
<td>$1,603,719</td>
</tr>
</tbody>
</table>

NOTES TO FINANCIAL STATEMENTS (CONT.)
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 in 2014 and 2013 by the Institution for development services the Foundation provided to the Institution. These amounts are included as a reduction of 2014 and 2013 development expenses in the accompanying statements of activities.

The Foundation guaranteed a promissory note payable by the Institution totaling $1,053,819 at March 31, 2014. Amounts held by the Foundation on behalf of the Institution to help repay the note totaled $765,379 and $757,209 at March 31, 2014 and 2013.

7. Net Assets:
At March 31, 2014 and 2013, the market value of certain endowment funds was $149,276 and $806,396 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>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$ 7,676,530</td>
<td>$ 5,157,575</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>3,501,940</td>
<td>2,120,098</td>
</tr>
<tr>
<td>Temporarily restricted gifts</td>
<td>5,182,032</td>
<td>4,606,447</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 16,360,502</strong></td>
<td><strong>$ 11,884,120</strong></td>
</tr>
</tbody>
</table>

Temporarily 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) 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>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$ 40,461,782</td>
<td>$ 39,815,669</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>26,820,407</td>
<td>24,376,011</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 67,282,189</strong></td>
<td><strong>$ 64,191,680</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 $70,000 and $72,000 for the years ended March 31, 2014 and 2013.

9. Fair Value Measurements:
Investments in marketable securities are measured at fair value on a recurring basis on the statements of financial position. The fair value for marketable securities at March 31, 2014 and 2013 were determined based on quoted prices in active markets.
For the years ended March 31, 2014  2013

General and administrative:
Investment management  $ 375,891 $ 315,843
Salaries and benefits    231,103  230,511
Office                    8,001  10,263
Travel and hospitality  25,975  23,505
Professional and consulting    32,389  27,626
Equipment maintenance and repairs    20,981  14,981
Education                   1,434  1,989

$ 695,774 $ 624,718

Support to the Institution:
Chautauqua Fund  $ 3,563,728 $ 3,514,364

Program:
Building, structures and grounds $ 247,877 $ 184,665
General operations  212,523  366,136
Lectureship and CLSC  507,379  373,005
Performing arts  478,971  372,555
Religion  151,043  127,925
Scholarship and youth  224,982  179,433

$ 1,822,775 $ 1,603,719

Development:
Salaries and benefits $ 855,886 $ 828,969
Promotion and communications  103,715  51,222
Office                    42,488  79,410
Travel and hospitality  127,083  114,163
Professional and consulting  39,033  23,609
Equipment maintenance and repairs  21,379  19,502
Education                   5,587  6,435
Reimbursement by the Institution (350,000) (350,000)

$ 845,171 $ 773,310

Total expenses $ 6,927,448 $ 6,516,111
ENDOWMENT FUNDS

UNSPECIFIED FUNDS
$25,352,304 Assets
$67,453 Current Year Distribution

* 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 *
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 F. 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 Karslake 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

ENDOWMENT FUNDS
Ann and Charles H. Lytle Endowment
Jeannette B. Mainwood Fund
Gerald and Dorothea Maloney Endowment
Clara Masik Endowment
Mary E. McCarn Fund *
Mary Jane and Donald McClurg Endowment
Margaret C. Mercer Endowment
Richard H. Miller Fund
Dawson E. Charlotte B. Molyneaux Endowment
Jane C. Morgan Fund
Lewis W. & Katherine C. Morgan Fund
James R. Morris III Fund
The George E. and Susan Moran Murphy Family Fund
Robert B. and June A. Osburn Fund
Robert Pace Endowment Fund
Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
William H. and Mary C. Park Fund
Mary Lou Cady Parlato Endowment for Chautauqua
Dorothy Payne Endowment Fund
Charles E. and Gladys W. Peirce Fund
Margaret Penn Fund
Sheila Penrose and Ernest Mahaffey Endowment for Chautauqua
Steven W. and Barbara P. Percy Endowment for Chautauqua
Helen Pickup-Hyman Fund
Mary Ellen Pindyck Fund
Sam and Petey Tinkham Price Family Fund
Mary Oram Reading Fund
Agnes H. Reigart Fund
Elaine Y. Rieser Endowment for Chautauqua
William Rittman Fund
Mary Ritts Endowment
Walter Roberts Fund
Doris H. Ruslink Fund *
Harper G. and Blanche Billings Rusterholtz Fund
Herbert B. Sachse Fund *
Newton B. Schott, Jr. and Antoinette L. LeQuire-Schott
Endowment
Barbara and John Schubert Endowment Fund
Dr. O. Peter Schumacher Fund
Emma O. and H. Parker Sharp Fund
Jane R. and Walter C. Shaw, Jr. Fund
Ralph C. Sheldon, Jr. Fund
Dorothy E. Shepherd Fund *
Bert W. and Joanne R. Simons Endowment
George T. and Margaret D. Snyder Endowment for Chautauqua
Nancy Coburn Snyder Endowment Fund
Thomas H. and Joan Stevens Family Endowment for Chautauqua
Betty P. and J. Bruce Stromgren Fund *
The Robert C. and Patricia D. Switzer Family Fund
Tate Family Fund
Eleanor M. Thomas Fund
The Susan and John Turben Foundation Endowment for Chautauqua
Joseph & Elizabeth Verlie Endowment
Carl A. and Mary Louise Viehe Family Endowment
Nina and Norman Wain Family Endowment for Chautauqua
Evelyn Wargo Endowment
Nina T. Wensley Fund
Helen N. White Fund
Robert O. Wilder Family Fund
The Mary S. Wilsdon Fund for Chautauqua *
Henry L. Wood Fund
John B. Yoder Endowment for Chautauqua
Robert and Virginia Young
The Deborah and Allen Zaretsky Fund
Stephen J. Zenczak and Patricia E. Feighan Endowment for Chautauqua
General Endowment Fund
**SPECIFIED FUNDS**

$49,009,238 Assets  
$1,612,312 Current Year Distribution

New funds are designated in orange.

**PHYSICAL MAINTENANCE FUNDS**

$7,857,825 Assets  
$247,876 Current Year Distribution

Buildings and Structures  
$6,441,153 Assets  
$203,704 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 Bonnelyoung for Bonnefourn-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. Lenna Hall Endowment Fund
- The Helen Colvill Lincoln Fund to Maintain Lincoln Memorial Dormitory
- The Massey Memorial Organ Fund
- The McClure Shuffleboard Fund

**AMPHITHEATER ENDOWMENT**

The Amphitheater is the heart of Chautauqua. It sits near the center of the grounds and is where we Chautauquans come together to explore issues, to worship and to witness the creative expression of artistic excellence. The development of the Amphitheater in 1892 and 1893 firmly demonstrates the optimism, dreams and commitment of our early leaders to the promise of Chautauqua and all it could be. Now it is time to revitalize this home to all Chautauquans.

While the rehabilitation of the Amphitheater will improve sight lines, accessibility, efficiency of use, capacity and the comfort of our program participants, the Amphitheater’s endowment will ensure that the Institution can care and maintain the facility for another 100 years. Every Chautauquan can make a difference by joining those who have already established an endowment for the Amphitheater. During the Promise Campaign, the Foundation seeks to increase endowment for the Amphitheater by $3,500,000.
McKnight Hall Maintenance Endowment
Kimberly and Robert Myers Dance Facilities Endowment
The Oliver Archives Center Endowment Fund
The I. Hale and Judy Oliver Fund for Bratton Theater
The Rait Family Fund
The Ann Simpson Rice Youth Fund
School of Music Facilities Endowment
The Sharpe/Trefts Memorial Fund
Strohl Center Endowment
The Susan and John Turben Fund for Bratton Theater
The Sybil and Stuart Willen Fund for Bratton Theater
Youth Facilities Fund

Specific Gardens and Parks
$916,033 Assets
$32,431 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
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
$500,639 Assets
$11,741 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
$10,832,257 Assets
$337,109 Current Year Distribution
Lectureships
$8,342,329 Assets
$259,953 Current Year Distribution
10:45 Lecture Platform Endowment
Malcolm Anderson Lecture Fund
The Sondra R. and R. Quintus Anderson Lectureship
Helen S. and Merrill L. Bank Lectureship
David and Wendy 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 Foglestown Family Lectureship Fund
The Chip and Gail Gamble Lecture Endowment
Connolly Family Endowments

Jack Connolly grew up just south of the grounds. He attended Chautauqua Central School and was a Boys’ and Girls’ Club waterfront counselor as a teenager. After graduating from Harvard College and Harvard Business School, Connolly spent 18 years in the consumer goods industry. He was a trustee of the Institution from 1990 to 1998, Co-Chair of the Chautauqua Fund from 2002 to 2006 with his late wife, Marcia, and has served as a Chautauqua Foundation Director since 2003.

For Connolly, supporting Chautauqua means ensuring its sustainability both in the treatment of the grounds and financially. His generosity over the years has created a number of endowments that support various elements of the Chautauqua experience including: opera, the School of Music, a family garden, unspecified endowment, and an endowment for the ongoing care and maintenance of Connolly Residence Hall which was renovated in 2009 in memory of Marcia and provides housing for members of the Opera Company. Jack’s most recent commitment of an unrestricted bequest comes in addition to the IRA he has signed over to Chautauqua.

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
Richard W. and Jeannette D. Kahlenberg 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
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
$1,392,006 Assets
$46,134 Current Year Distribution
The Baird-Fuller Memorial Fund
Caroline Roberts Barnum and Julianne Barnum Follansbee Fund
The Alice M. Bentley CLSC Memorial Fund
John H. Bliss Memorial Fund
Lowell & Frances Hyams Brentano Library Fund
Chautauqua Literary Arts Endowment
Chautauqua Prize Endowment Fund
C.L.S.C. Class of 1940 Endowment Fund
C.L.S.C. Class of 1948 Endowment Fund
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
Gail Anne Clement Olson Fund
The Martha and Scott Reading Fund
Grace Tongren Ross Fund for Smith Memorial Library
Smith Memorial Library Fund

Youth Activities
$570,420 Assets
$18,120 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

Other
$527,502 Assets
$12,902 Current Year Distribution
Emily and Richard Smucker Directorship for Education

FINE & PERFORMING
ARTS FUNDS
$14,154,690 Assets
$478,971 Current Year Distribution

General
$2,775,631 Assets
$99,404 Current Year Distribution
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

Opera
$4,206,910 Assets
$123,232 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

Symphony
$3,802,205 Assets
$142,594 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
Chautauqua Symphony Orchestra Endowment Fund
The Carl and Lee Chaverin Fund
William D. Kuhns Fund for General Music Purposes of Chautauqua Institution
The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra
Helen T. Logan Fund for the Chautauqua Symphony Orchestra
Mr. & Mrs. Sam A. Miller and Mr. & Mrs. Edward S. Babcox Memorial Fund
CHAUTAUQUA CLERGY LEADERSHIP PROGRAM

Chautauqua’s Department of Religion has been awarded a $500,000 grant from the Lilly Endowment to launch a new leadership development program for Christian clergy who have five to ten years experience in ministry. Chautauqua’s decade of experience with the New Clergy Program, which has been sustained through the generosity of the Robertson Foundation and others, garnered the attention of the Lilly Endowment and made this new program possible.

Fifteen pastors will be selected to participate in six seminar sessions to be conducted at Chautauqua over two years, involving two immersion weeks during Chautauqua’s regular season, and four mid-week retreats off-season. Digitally mediated study and discussions will also take place between seminars. According to the terms of the grant, the program is designed to create “a network of demographically, ecumenically and theologically diverse, early-career clergy who envision themselves as ‘public pastors,’ responsible to their local congregations while also exercising leadership in their larger communities.”

The seminars will focus on the skills and knowledge needed for pastors who want to have an impact on local public policy and the welfare of the broader communities in which their congregations operate. The curriculum will be built, in part, on the theme weeks at Chautauqua during which the clergy will be on the grounds.
RELIGION FUNDS

$4,645,104 Assets
$151,044 Current Year Distribution

General
$1,387,656 Assets
$49,169 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

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
$874,633 Assets
$31,784 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
Randell-Hall Memorial Chaplaincy
Harold F. Reed, Sr. Chaplaincy
Edmond E. Robb-Walter C. Shaw Fund
John William Tyrrell Endowment for Religion

Lectureships
$1,257,016 Assets
$38,586 Current Year Distribution
Carnahan-Jackson Religious Lectureship
The Jack and Elizabeth Gellman and Zaretzky 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 Recroft 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
$1,125,799 Assets
$31,505 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 Cambell 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
Subagh Singh Khalsa and Subagh Kaur Winkelstern established the Fund for the Exploration of World Religions and Spiritual Practices to support experiential programs and spiritual practices of various kinds, as taught within the world’s religious traditions. Khalsa is the founder of the Mystic Heart Program, a Department of Religion initiative aimed at teaching Chautauquans meditation techniques from various world faiths and traditions. The fund will leave room for the Mystic Heart Program to evolve and grow and allow for additional programs to be created in the future. The purpose of the fund reflects the goals and values of the Subaghs. They hope that by creating the fund a seed has been planted and that others involved in spiritual practice will help it to sprout.
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
The Michael and Jane Eisner Scholarship Fund
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
William and Pauline Higie School of Music Scholarship
Robert D. Hiller Scholarship Fund
The Arthur and Arlene Holden Scholarship for Chautauqua
W.T. Holland Memorial Piano Scholarship Endowment
Elke Kieserling Hoppe Scholarship
Cyril T.M. Hough Memorial Scholarship Fund
Ruth M. Skinner Hutchins Scholarship Fund
Innes Family Scholarship for Studio Arts
The Dorothy M. Jackson Memorial Scholarship in Piano
The Lucinda Ely Johnson Scholarship
The Max and Edythe Kahn Scholarship Fund
The Nancy and Norman Karp Scholarship Fund
Thomas E. Kaufman Memorial Music Scholarship
The Kaylor Family Scholarship
The Danny Kayne Music Scholarship Fund
Audrey and Kenny Kobltitz Scholarship
Konneker Scholarship
The John and Mary Lou Kookogey Scholarship
Felicia and Andy Landis Memorial Fund
The LaPenna-Koch Scholarship
The Marilyn G. Levinson and Nathan Gottschalk First Chair Award for MSFO Endowment
Anne R. Logan Scholarship Fund
Craig J. Luchsinger Memorial Scholarship
The Anna Mary and Richard M. Maddy Music Scholarship Fund
Marianne Elser Markham Endowment Fund
The Lucille J. McClure Memorial Music Scholarship Fund
Roberta J. McKibbin Memorial Scholarship for Visual Arts
Everett and Sarah Holden McLaren Scholarship
David L. and Jane K. Miller Art Scholarship
Ralph E. Miller Memorial Scholarship for Music
The Ralph J. Miller and Florence L. Miller Memorial Scholarship in Music
The Sylvia Lucas Miller Scholarship in Music
The William E. Miller, Jr. Theater Scholarship
The Augusta L. Ebert Molyneaux Scholarship
The Elmer G. Molyneaux Scholarship
The Mary Louise Molyneaux Scholarship
Moore Scholarship Fund for Music
Jack I. and Barbara J. Morris Memorial Cello Scholarship
Gertrude T. Munger Piano Award Fund
The Abe Neches Scholarship for Dance
The Marian A. Neubauer Scholarship
Lily Lee Nixon Fund
The Fayette S. Olmstead Foundation and Pittsburgh National Bank Charitable Trust Fund
The Bernard Paul Memorial Scholarship Fund
Mary Elizabeth Peffer Music Scholarship
Rosalie H. Pembridge Dance Scholarship
Pennsylvania Scholarship Fund
Pennybacker Memorial Scholarship
JOYCE AND BOB TATE

Joyce and Bob Tate didn’t make Chautauqua their summer home until later in life, but when they did, they embraced almost every aspect of the Institution. They attended lectures, the symphony, and musical events, but they especially enjoyed the theater, activities of the Women’s Club, Bird Tree and Garden Club, and were also members of the Unitarian Universalist Fellowship. They enjoyed socializing with friends on the grounds and also with friends they brought to Chautauqua from Sarasota, Florida, their permanent residence.

In 2012, the couple knew their summers at Chautauqua were limited, and decided to make a gift of their home to Chautauqua. The Chautauqua Foundation sold the home and its contents in 2013 and the proceeds were distributed to the Chautauqua Foundation, with a provision for the Women’s Club and the Unitarian Universalist Fellowship to each receive a portion. The Tates had determined that their gift would establish two separate endowment funds: one unrestricted and the other for performing arts and maintenance of the Amphitheater.
**FLEXIBLE PROGRAM FUNDS**  
* $4,410,196 Assets  
* $151,496 Current Year Distribution

- The Bromeley Family Fund  
- The Carnahan-Jackson Foundation Fund for Chautauqua  
- The Chautauqua/Jamestown Fund for Education, Religion and the Performing Arts  
- Connolly Endowment for Chautauqua  
- The Winifred S. Dibert Fund for Chautauqua  
- Elizabeth Elser Doolittle Endowment Fund for Adult Programming  
- H. David Faust Leadership Fund  
- Scott and Patti Fine Endowment Fund  
- The First Family Fund  
- The George and Julie Follansbee Family Fund  
- The Jane Robb Shaw Hirsh Endowment  
- The Jim and Lynn Gasche Levinson Fund for Chautauqua  
- Locke-Irwin Fund  
- The Loynd Family Fund  
- The Mackenzie Fund for Chautauqua  
- Cornelia Chason Miller Memorial Fund  
- The Lewis Miller Memorial Fund  
- The Walter L. and Martha Tinkham Miller Fund  
- The Miriam S. Reading/Richard H. Miller Fund  
- The Helen H. and Paul L. Sample Fund  
- The Donald Chace Shaw Fund  
- Tate Family Endowment for Fine and Performing Arts  
- The Edris and David H. Weis Family Fund  

**SEGREGATED ENDOWMENT FUND**  
* $109,789 Assets  
* $30,000 Current Year Distribution

- Harry A. Logan, Jr. Fund for the Performing Arts

**TEMPORARILY RESTRICTED FUNDS**  
* $426,094 Assets  
* $113,000 Current Year Distribution

- Julia Gibson Axtell Memorial Fund  
- Braham Garden Fund  
- John Burden Fund  
- The Wendy Cohen Fund  
- Jack and Marcia Connolly Fund  
- Court Family Fund for Visiting Authors  
- Fowler Kellogg Maintenance Fund  
- Barbara and Peter Georgescu Fund  
- The Will and Ann Lee Konneker Fund for Chautauqua  
- LeVan Family Garden Fund  
- Candace Littell and Scott Maxwell Endowment Fund  
- AADH Fund  
- Percy Fund for Chautauqua

**OTHER SPECIFIED FUNDS**  
* $866,285 Assets  
* $36,886 Current Year Distribution

- Allegheny Jazz Society Fund  
- Barakat Fund  
- Philip J. and Barbara S. Brunskill Fund  
- Buffalo-Chautauqua Idea and Connection: Galucki Family Endowment Fund  
- The Cook Fund  
- Cornell/Ingram/Karslake Awards Fund  
- Elizabeth Dickson Memorial Fund  
- Valentine and Elizabeth Rider Frees Fund  
- The Joseph and Anna Gartner Endowment Fund  
- Charles Heinz and Louise Heinz Lockhart Fund  
- The Frank G. Karslake Fund  
- Samuel J. Kresge Fund  
- Elizabeth Miller Fund  
- The Morgan-Ludwig Fund  
- The Helen M. Overs Fund  
- Jack A. and Muriel Winter Endowment Fund  
- Jack R. Winter Fund  
- Michael Winter Fund  
- The Thomas P. and Shirley M. Woolaway Fund
The following donors have contributed $10,000 or more to the endowment of the Chautauqua Foundation. We thank them for perpetuating the idea and place of Chautauqua. These totals include gifts and pledges received or transferred and held in trusts or the pooled life income fund since May 1937.

New donors and changes in giving levels are denoted in orange.

In Excess of $2,500,000
The Carnahan-Jackson Foundation
Emily and John Corry
Mr. and Mrs. Oliver M. Langenberg
Elizabeth S. Lenne
Patty and Spencer Van Kirk III

$1,000,000 to $2,499,999
Anonymous (1)
Mrs. Robert D. Campbell
Jack Connolly
Dr. and Mrs. R. William Cornell
Mr. and Mrs. Robert W. Cornell
Joan and David Lincoln
Kay H. Logan
Martha and Harold F. Reed, Jr.
Mr. and Mrs. Richard M. Rieser
Mr. and Mrs. Robert M. Smith
Mr. and Mrs. Richard K. Smucker
Lowell and Rebecca Strohl and Family
Mr. and Mrs. Ralph Swingle

$500,000 to $999,999
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Steve and Polly Percy
Miriam S. Reading and Richard H. Miller
Mr. and Mrs. H. Parker Sharp
Robert and Joyce Tate
Mr. and Mrs. Robert O. Wilder

$250,000 to $499,999
Anonymous (1)
Sandy and Quint Anderson
Arnold and Jill Bellowe
June Bonyor
Ms. Lilian Brink
Gary and Willow Brost
John W. and Anne Staples Burden
Chautauqua Opera Guild
Wendy and Edward Cohen
John C. Court Family Foundation
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Char and Chuck Fowler
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Mary Kuhns Trust
Jim and Lynn Levinson
Mrs. John C. Lincoln
Mrs. Charles H. Lytle
Warren K. Martin
Cornelia C. Miller
Miss Jane C. Morgan
Mr. and Mrs. Lewis W. Morgan
National Endowment for the Arts
The Estate of Gail Clement Olson
Marjorie McCarthy Robins
Herbert B. and Gerda Sachse
Mr. and Mrs. Ralph C. Sheldon, Jr.
Mr. and Mrs. J. Bruce Stromgren
Lutie Soper Wilsdon Memorial
Virginia H. and Robert R. Young

$100,000 to $249,999
Mrs. Lucille S. Adamson
Paul M. Alexander
Andy and Peggy Anderson
Mr. and Mrs. A. Chace Anderson
John E. Anderson
Jack and Elizabeth Armstrong
Clement and Karen Arrison Foundation
Penny Bank
Tracy and John Barakat
Robert and Je’Anne Bargar
Nancy and Dick Bechtolt
Mary and Charles Begerow
Erika Block
Ellis Bradford and Clara Wood Golay
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Tug and Barbara Branch
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Jean and Tom Bromeley
The Gladys Brooks Foundation
Maxine M. Carleton
Dr. Paul E. Cawein
Beverly and Bruce Conner
Mr. and Mrs. George L. Cornell
The Crockett Family
Kevin, Karen and Jonathan Crowder
Mr. and Mrs. John R. Cummings
The DeFrees Family Foundation
David B. DeLancey
Jennifer DeLancey
Elizabeth Elser Doolittle Charitable Trusts
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Chip and Gail Gamble
vic and Joan Gelb
Elizabeth and Jack Gelman
Glendorn Foundation
Mr. and Mrs. Timothy B. Goodell
Mr. and Mrs. William R. Goodell
Jim and Elisabeth Groninger
Travis and Betty Halford
Dr. Heber R. Harper
Lisa Heinz
Katherine Hembree
William F. and Pauline G. Higie
Jane Robb Shaw Hirsh
Mr. and Mrs. Arthur S. Holden, Jr.
The Elke Hoppe Youth Advancement Trust
The Hultquist Foundation, Inc.
Charles R. Hunter, Jr.
Mr. and Mrs. Wilmot W. Irish
Mr. and Mrs. Forest B. Irwin
Kathryn Frantz Israel
Jeannette D. Kahlenberg
Richard and Mary Kelly
Kevin and Joan Keogh
Ron and Rosie Kilpatrick
Donald W. King
James T. and Hetty E. Knox
Ingeborg E. Koch
Ronald and Barbara Leirvik
Helen T. Logan Charitable Trust
William C. Lantz
Dr. Barb Mackey
Anna Mary and Richard M. Maddy
Alison and Craig Marthaissen
Ms. Cordelia S. May
Miss Mary E. McCann
Dr. and Mrs. John W. McCredie, Jr.
Dr. and Mrs. Frank E. McElree, Jr.
W. Richard and Mary Lu Mertz
Edward and Lynn Metzger
Ministrare, Inc.
Avril Moore
Mr. and Mrs. Frank W. Moore
Thomas A. Moore
Mr. and Mrs. James Reed
Morris, IV Family
George E. and Susan Moran Murphy
Richard M. Murray
The Robert L. and Kimberly
J. Myers Fund of the
Community Foundation of
Tampa Bay
National Endowment for the
Humanities
Margery and Sanford Nobel
Hale and Judy Oliver
Robert A. Ott, Jr.
Mr. and Mrs. William H. Park
Mary Lou Parlato
Dorothy M. Payne
Miss Margaret A. Penn
Sheila Penrose and Ernest
Mahaffey
Prue C. and William M. Petre
Gloria Plevin
Richard A. and Esther M. Popp
Sam and Petey Price
Mrs. Lois Raynow
The Reinberger Foundation
Mr. and Mrs. Bartlett Richards, III
Mrs. Bartlett Richards
Pat and Bill Rittman
Joseph H. and Florence E.
Roblee Foundation
Wallace P. Rusterholtz
Mr. Donald Chace Shaw
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Marty and Sandy Coyle
The Crockett Family
Eleanor B. Daugherty
Mr. and Mrs. Joseph H. DeFrees
The Winifred C. Dibert Foundation, Inc.
Mrs. Grant A. Dibert
June and Barry Dietrich
Elizabeth Elser Doolittle Charitable Trust
Arthur E. Earley
Charles Edison Fund
Mr. and Mrs. Hal A. Fausnaugh
Lauren Rich Fine and Gary Giller
Mr. and Mrs. Robert K. Fletcher
Mr. and Mrs. James L. Flynn
Mr. and Mrs. George L. Follansbee
Char and Chuck Fowler
Mimi and Jim Gallo
Gebbie Foundation, Inc.
vic and Joan gelb
General Electric Foundation
Barbara and Peter Georgescu
Mr. and Mrs. Timothy B. Goodell
Mr. and Mrs. William R. Goodell
S. Allen Goodwin
Jim and Elisabeth Groninger
Jane A. Gross
Susan and Tom Hagen
Kathleen E. Hancock
Ms. Verna Harrah
Lisa Heinz
Dorothy and Bill Hill
Dr. Michael G. and Carol Nobel Hirsh
The Hultquist Foundation, Inc.
Bill and Angela James
Karín A. Johnson
W. Alton Jones Foundation
Joe and Pam Kanfer and the Lippman Kanfer Family Foundation
Kevin and Joan Keogh
Ron and Rosie Kilpatrick
Stewart and Donna Kohl
Dr. and Mrs. W.R. Konkeuer
The Kresge Foundation
Mary Kuhns Trust
Trust Of William D. Kuhns
Mary and Oliver Langenberg
Elizabeth S. Lenna
Jim and Lynn Levinson
Lilly Endowment, Inc.
Joan and David Lincoln
Mrs. John C. Lincoln
Helen T. Logan Charitable Trust
Kay H. Logan
James H. Lynch, Jr.
Mrs. Charles H. Lytle
Milton and Tamar Maltz
Chris and Sue Martin
Warren K. Martin
Dr. and Mrs. John W. McCredie, Jr.
Dr. and Mrs. Frank E. McEiree, Jr.
Bruce W. and Sarah Hagen McWilliams
Cornelia Chason Miller Ministre, Inc.
Mary Anne and John Morefield
Miss Jane C. Morgan
Mr. and Mrs. Lewis W. Morgan
George E. and Susan Moran Murphy
National Endowment for the Arts
New York State Council on the Arts
Ralph H. and Elizabeth C.
Norton Philanthropic Trust
Office Depot Foundation, Inc.
The John R. Oishei Foundation
Hale and Judy Oliver
The Estate of Gail Clement Olson
Robert A. Ott, Jr.
Mr. and Mrs. William H. Park
Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
Sheila Penrose and Ernest Mahaffey
Steve and Polly Percy
PNC Financial Services Group
Richard A. and Esther M. Popp
Mrs. Lois Raynow
Miriam S. Reading and Richard H. Miller
Harold and Martha Reed
Mrs. Bartlett Richards
Richard and Elaine Rieser
Marjorie McCarthy Robins
Joseph H. & Florence E. Roblee Foundation
Herbert B. and Gerda Sachse
Mr. and Mrs. H. Parker Sharp
Ralph C. Sheldon Foundation, Inc.
Mr. and Mrs. Robert M. Smith
Mr. and Mrs. Richard K. Smucker
Lowell and Rebecca Strohl and Family
Mr. and Mrs. Bruce Stromgren
Mr. and Mrs. Henry B. Suh, Jr.
Mr. and Mrs. Ralph Swingle
Robert and Joyce Tate
Helen Truman Trust
The Turney Family
Patty and Spencer Van Kirk, III
Dr. and Mrs. Robert J. Weiss
The Margaret L. Wendt Foundation
Mr. Robert O. Wilder
Lutie Soper Wilsdon Memorial Fund
Virginia H. and Robert R. Young
Mr. and Mrs. Howard Zemsky
Sam and Shirley Zemsky
Steve Zenczak and Pat Feighan
The Foundation gratefully acknowledges endowment contributions made in memory of the following:

Susan Allison
Mable L. Bailey
Christine Bear
Stephen C. Brown
Helen P. Cornell
Ralph Crockett
Leslie Curtis
Carolyn Donkervoet
Julie Follansbee
Susie Follansbee
Ruth Galos
Marjorie Geller
Bob Gingell
Charles E. Goodell
Jean Rice Goodell
Pauline and Nathan Gottschalk
James Hauck
Jack Hazlett
Ernest and Ruth Himebauch
Deborah Shaw Hiscox
Helen Holt
Katie Howard
Gloria Lasser
Arthur C. LeVan, Sr.
Flora Mackenzie
Dr. Frank E. McElree, Jr.
John Morefield
Joshua P. Morey
Lewis and Tass Morgan
Barbara Morris
Marshall Nelson
Jean Nickeson
Petey Price
Douglas Raynow
Catherine Prussing Rodgers
Albert and Janet Schultz

Stanley Schultz
Allen C. Steere, Sr.
Rev. Dr. Arthur Stevenson
Marian Stranburg
Marnie Tolerton
Margaret Yates Tomsen
Peter Waasdorp
Marie Winkelstern

2014 MEMORIAL GIFTS
The Foundation gratefully acknowledges endowment contributions made in honor of the following:

Marguerite Allen  
Judy Austin  
Mr. and Mrs. Jim Barnes  
Gaylyn Bell  
Caroline Van Kirk Bissell  
Sharon Britton  
Dr. and Mrs. Carl Brown  
Jane Brown  
Mr. and Mrs. William Brown  
Karen Bryant  
Laura Butler  
Joan Brown Campbell  
Mr. and Mrs. Curtis Carter  
Mr. and Mrs. Sam Caverlee  
Bishop John and Karen Chane  
Mr. and Mrs. William M. Comegys, III  
Bill and Chloe Cornell  
Mr. and Mrs. Clay Eaves  
Mr. and Mrs. Bill Fleming  
Janet Fowler  
Sara France  
Mr. and Mrs. Gary Gaskins  
Peter and Barbara Georgescu  
Mr. and Mrs. Scott Gilpin  
Joseph and Toni Goldfarb  
Dr. and Mrs. Larry Hand  
Samuel Hazlett  
Mr. and Mrs. Gerry Hedgcock  
Mr. and Mrs. Nelson Helm, Jr.  
Frances Hendershot  
Frances Hewitt  
Mr. and Mrs. Kevin B. Hill  
Dr. and Mrs. Charles Hubley  
Louise Jackson  
Mr. and Mrs. T. Haller Jackson, III  
Mr. and Mrs. Alston Johnson  
Dr. and Mrs. Bruce Lowe  
Mr. and Mrs. E. Stanley Matthews, III  
Mr. and Mrs. David Melville  
James Miller and Chrissie Schelhas-Miller  
Mary Langenberg  
Mimi McDowell  
Mary Anne Morefield  
Hope Prince  
Mr. and Mrs. Arthur N. Sample, III  
Tucker Smathers  
George and Maggie Snyder  
Marj Sterritte  
Mr. and Mrs. Jimmy Stevens  
Sybil Willen
The Eleanor B. Daugherty Society was established to honor those individuals who have remembered Chautauqua in their estate plans through a bequest intention, a life income arrangement, a gift of real estate, as beneficiary of an IRA, or trust. The Society was named in honor of the late Eleanor B. Daugherty, a Chautauquan and retired music teacher from Buffalo, New York, who left a major bequest to Chautauqua.

New Society members are highlighted in orange.
### Directors

<table>
<thead>
<tr>
<th>Directors</th>
<th>Term Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td>John E. Anderson of Lakewood, New York</td>
<td>5, 7 2016</td>
</tr>
<tr>
<td>Thomas M. Becker of Lakewood, New York</td>
<td>3 ii</td>
</tr>
<tr>
<td>Cathy Bonner of Austin, Texas</td>
<td>2, 4 2017</td>
</tr>
<tr>
<td>Gary M. Brost of Buffalo, New York</td>
<td>1, 3, 5 2016</td>
</tr>
<tr>
<td>Chair, Audit Committee</td>
<td></td>
</tr>
<tr>
<td>Andrew L. Camden of Grosse Pointe, Michigan</td>
<td>5, 6 2017</td>
</tr>
<tr>
<td>John S. Connolly, Jr. of Boynton Beach, Florida</td>
<td>3, 6, 7 2014</td>
</tr>
<tr>
<td>Chair, Personnel Committee</td>
<td></td>
</tr>
<tr>
<td>Laura P. Currie of Nashville, Tennessee</td>
<td>2, 4, 6 2014</td>
</tr>
<tr>
<td>Lauren Rich Fine of Shaker Heights, Ohio</td>
<td>3, 5, 7 2016</td>
</tr>
<tr>
<td>Chair, Investment Committee</td>
<td></td>
</tr>
<tr>
<td>Karen J. Goodell of New York</td>
<td>2, 3, 6 2017</td>
</tr>
<tr>
<td>Chair, Nominating &amp; Governance Committee</td>
<td></td>
</tr>
<tr>
<td>William R. Goodell of Bronxville, New York</td>
<td>4, 5 2014</td>
</tr>
<tr>
<td>James G. Groninger of Richmond, Virginia</td>
<td>1, 5 2014</td>
</tr>
<tr>
<td>Thomas B. Hagen of Erie, Pennsylvania</td>
<td>1, 6 2017</td>
</tr>
<tr>
<td>William M. James of New York</td>
<td>2, 4 2016</td>
</tr>
<tr>
<td>John S. Kobacker of Gahanna, Ohio</td>
<td>4 2015</td>
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<tr>
<td>Christopher H. Lytle of New York</td>
<td>2, 5 2014</td>
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<tr>
<td>Susan Moran Murphy of Bloomfield Hills, Michigan</td>
<td>1, 6 2014</td>
</tr>
<tr>
<td>Steven W. Percy of Akron, Ohio</td>
<td>ex officio - 1, 2, 4, 5, 6, 7 2015</td>
</tr>
<tr>
<td>Chair, Executive Committee</td>
<td></td>
</tr>
<tr>
<td>Chair, Board of Directors</td>
<td></td>
</tr>
<tr>
<td>George T. Snyder of Pittsburgh, Pennsylvania</td>
<td>4, 7 2017</td>
</tr>
<tr>
<td>Stephen J. Zenczak of Gates Mills, Ohio</td>
<td>3, 4, 7 2015</td>
</tr>
<tr>
<td>Chair, Finance Committee</td>
<td></td>
</tr>
</tbody>
</table>

### Officers

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

### Staff

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

1 Coincides with term on the Chautauqua Institution’s Board of Trustees
2 Coincides 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. Rittel - August 1950 to September 1954
Harold F. Reed - August 1951 to August 1971
Mrs. Walter F. Rittel - 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. Fausnaugh - April 1990 to August 1994
R. Quintus Anderson - April 1991 to August 1995
William F. Hill, II - April 1991 to August 2005
Patricia Goldman - August 1992 to August 2003
Marilyn G. Levinson - August 1992 to August 2000
William H. Park - August 1993 to August 2005
William G. Karslake - August 1994 to August 1995
Thomas R. Bromeley - August 1995 to June 2001
vic gelb - August 1995 to August 2011
Selina P. Johnson - August 1996 to August 2008
Wilfred R. Konneker - January 1996 to August 2006
Lowell K. Strohl - August 1996 to February 2010
Miriam S. Reading - January 1997 to August 2006
Martin Coyle - August 2000 to November 2003
Wendy Cohen - August 2001 to May 2011
Scott McVey - 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
I. Hale Oliver - August 2005 to August 2013
George T. Snyder - August 2006 to August 2007
John A. Corry - January 2008 to August 2013
Charlotte A. Fowler - August 2008 to December 2012

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George T. Snyder - August 2006 to August 2007
John A. Corry - January 2008 to August 2013
Charlotte A. Fowler - August 2008 to December 2012

Former Directors and Terms of Service

John D. Hamilton - August 1967 to August 1971
Richard H. Miller - August 1971 to August 1996
Lowell K. Strohl - August 1996 to August 2002