MISSION STATEMENT

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

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

STATEMENT OF PURPOSE

Article II, Corporate Charter May 14, 1937

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

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

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

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

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

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

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

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

Managing change is at the heart of leadership. For both of us, fiscal year 2019 — April 1, 2018 to March 31, 2019 — was dominated by analyzing, discussing, debating and approving a change in the Foundation’s responsibilities, as well as planning how to implement that change. Throughout, we partnered with our colleagues at the Institution to allow Chautauqua to have an even more robust return from philanthropy.

In response to the challenges of the time, in 1991, the development office and its staff who raised funds for annual giving, capital projects and endowment moved from the Institution to the Foundation. Now in a different time with fresh opportunities to streamline and enhance our fundraising efforts, as of January 2020, all but three of the current employees of the Foundation will return to the Institution, where I (Geof) will serve as vice president of advancement. Debbie Moore, the current chief financial officer, will become executive director of the Foundation.

Returning the development function to the Institution should yield several benefits.

1. A more integrated overall approach to marketing, fundraising and communication — we hope to increase efficiency across departments, as the Office of Advancement (a new name beginning in January 2020) will be part of the same organization as program staff and other Institution colleagues.

2. Endowment growth — moving the cost of development to the Institution will relieve the Foundation’s endowment from bearing that cost and, over time, allow the endowment to grow more rapidly.

3. Enhanced attention to growing the endowment — the Foundation’s board will be able to focus more intently on responsible investing, prudent spending and fundraising for endowment.

Much of the impetus for these changes came from the Institution’s new strategic plan and the leadership and service of Michael Hill, a member of the Foundation board and president of the Institution. The strategic plan, 150 Forward, calls for Chautauqua to imbed philanthropy as a fundamental part of the culture of the community and thus dramatically increase its share as a revenue source for the Institution. Importantly for the Foundation, as an indicator of success, the plan sets a goal of achieving an endowment of $125 million by the end of 2024.
We want to reassure you of the permanence of the Chautauqua Foundation. **Realigning our staff does not affect the Foundation’s status as a 501(c)3 charity or its role as custodian of the permanent assets that benefit the Institution.** The Foundation will continue to hold and invest gifts to endowment and annually make available to the Institution an amount in accordance with the spending policy established by the Foundation’s board of directors. The Foundation’s board will continue to steward and manage these funds and participate on the Development Council, the Institution’s governance committee for philanthropy. The board as a whole will remain partners with the Institution in meeting our ambitious fundraising goals and particularly for gifts through estate plans.

The responsibilities of you, our valued members, do not change either. The Foundation will continue as a membership corporation with the same eligibility qualifications for membership and the same right to elect directors of the Foundation.

Also, in this past year through its Nominating and Governance Committee, the Foundation’s board has prepared for my (Cathy’s) decision to end service as board chair at this year’s annual meeting on August 17, 2019. At the board meeting immediately following the Foundation’s membership meeting, the board will receive and vote upon the nomination of Tim Renjilian as chair of the board.

To add clarity and bring the Foundation more into line with other charities, we will be changing our fiscal year to a calendar year. Thus, we will report our results to you in the spring each year rather than the summer. We will continue to hold the annual public meeting of the membership in August each year.

Inside these pages you will be able to review the results for fiscal ’19. Happily, the number and amount of new gifts to endowment were substantial and, as you will read in the Treasurer’s Report, the endowment and net assets have now exceeded $100 million. One of the many highlights of the year was the community’s response to the Foundation’s “Stand Up and Be Seated” campaign to provide over $5 million in funds to secure the ongoing maintenance of the Amphitheater.

We thank you, our donors, for your gifts of all sizes to the Foundation that will serve in perpetuity to benefit the Institution. It is our great honor to be the stewards of your support and the fiduciaries for your investments in Chautauqua.

Sincerely,

Cathy Bonner, Chair, Board of Directors

Geo Follansbee, Chief Executive Officer

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**Photo:** Dave Munch
Total Philanthropic Activity

In this past fiscal year, Chautauquans have generously supported Chautauqua Institution with over $16 million in total philanthropy, which includes pledges, outright gifts and planned gifts.

The information below is based on fiscal years ended on March 31 and includes shifting other special gifts into the Chautauqua Fund for 2018 and 2019.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Chautauqua Fund</th>
<th>Endowment</th>
<th>Capital &amp; Other</th>
<th>Total Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>$4,648,221</td>
<td>10,359,142</td>
<td>1,173,771</td>
<td>16,181,134</td>
</tr>
<tr>
<td>2018</td>
<td>4,555,953</td>
<td>7,060,417</td>
<td>1,004,425</td>
<td>12,620,795</td>
</tr>
<tr>
<td>2017</td>
<td>3,838,586</td>
<td>7,028,438</td>
<td>1,554,555</td>
<td>12,421,579</td>
</tr>
<tr>
<td>2016</td>
<td>3,707,326</td>
<td>9,326,210</td>
<td>8,834,104</td>
<td>21,867,640</td>
</tr>
<tr>
<td>2015</td>
<td>3,974,259</td>
<td>3,545,650</td>
<td>11,489,663</td>
<td>19,009,572</td>
</tr>
</tbody>
</table>

Chautauqua Fund

All gifts to the Chautauqua Fund are transferred to the Institution and used in the annual operating budget of the Institution to support the full range of programming Chautauqua offers.

Donors who have made an annual Chautauqua Fund gift are recognized on a calendar-year basis.

Endowment

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

Donors who have made an endowment gift are recognized on pages 40-43.

Capital & Other

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

Donors who have made capital or special gifts are recognized on a calendar-year basis.
Total Giving by Area of Support
This chart represents total philanthropy of $16.2 million for the fiscal year ended March 31, 2019 by area of support.

Five-Year Average Cost of Fundraising
The costs of fundraising efforts performed by the Foundation are reported in the Foundation’s audited financial statements. These costs are in service to all three categories of philanthropy as described in the prior page. The five-year average of such costs as a percentage of total philanthropy was 8.6% in 2019.
Numerous individuals and organizations have expressed their commitment to Chautauqua through extraordinary expressions of philanthropy. This lifetime giving list recognizes and thanks the cumulative generosity of donors to the annual Chautauqua Fund, capital projects, endowment or who have pledged or transferred, assets as part of certain planned gift commitments, a cumulative amount of $250,000 or more.

We have highlighted donors new to this list in orange.

**Greater than $5,000,000**
Susan and Thomas Hagen
Mary and Oliver Langenberg
Joan and David Lincoln
Patty and Spencer Van Kirk, III

**$2,500,000 to $4,999,999**
The Carnahan-Jackson Foundation
Jack and Marcia Connolly
Emily and John Corry
Gebbie Foundation, Inc.
The Hultquist Foundation, Inc.
The Lenna Foundation
Elizabeth S. Lenna
Lippman Kanfer Family Foundation
Kay H. Logan
Ralph C. Sheldon Foundation, Inc.
Elaine and Richard Rieser
Mr. and Mrs. Richard K. Smucker
Lowell and Rebecca Strohl and Family

**$1,000,000 to $2,499,999**
John T. and Katherine G. Bailey
Mr. and Mrs. Edward P. Boyle
Jean and Tom Bromeley
Mrs. Robert D. Campbell
Chautauqua Women’s Club, Inc.
Margaret Clarkson and George Heintzelman
Mr. and Mrs. George L. Cornell
Mr. and Mrs. Robert W. Cornell
Dr. and Mrs. R. William Cornell
Mrs. Grant A. Dibert
Lauren Rich Fine
Mr. and Mrs. Robert K. Fletcher
Char and Chuck Fowler
Barbara and Peter Georgescu
Betsy C. Goodell
William R. Goodell
Stewart and Donna Kohl
Dr. and Mrs. W.R. Konneker
The Kresge Foundation
Mrs. Charles H. Lytle
The Milton and Tamar Maltz Family Foundation
Jesse and Cathy Marion
Bruce W. and Sarah Hagen
McWilliams
Mary Anne and John Morefield
New York State Council On The Arts
Hale and Judy Oliver
Rosalie H. Pembridge
Steve and Polly Percy
Martha and Harold F. Reed, Jr.
Mr. and Mrs. Robert M. Smith
Sydelle Sonkin and Herb Siegel
Mr. and Mrs. Ralph Swingle
Helen Truman Trust

**$500,000 to $999,999**
Dorothy L. Anderson
Sandy and Quint Anderson
Arnold and Jill Bellowe
Kathy and James Braham
Gary and Willow Brost
Charitable Fund
John W. and Anne Staples
Burden
Andrew L. and Gayle Shaw Camden
Mr. and Mrs. David H. Carnahan
Chautauqua Opera Guild
Wendy and Edward Cohen
Court Family Foundation Fund
Eleanor B. Daugherty
Mr. and Mrs. Joseph H. DeFrees
The Winifred C. Dibert Foundation, Inc.
Charles Edison Fund
Edward L. Anderson, Jr.
Foundation, Inc.
Mr. and Mrs. Hal A. Fausnaugh
Mr. and Mrs. George L. Follansbee
Mimi and Jim Gallo
Chip and Gail Gamble
General Electric Foundation
Jane A. Gross
Thomas and Kathleen Harrick
Dorothy and Bill Hill
Dr. Michael G. and Carol Nobel Hirsh
Melvin H. and Karin A. Johnson
William D. Kuhs Trust
Jim and Lynn Levinson
Lily Endowment, Inc.

**$250,000 to $499,999**
Andy and Peggy Anderson
Edward L. Anderson and Joan E. Parsons
John and Barbara Anderson
Clement and Karen Arrison
Foundation
Arthur and Barbara Banner
Wendy and David Barenfeld
Family Charitable Fund
Pauline Beamer Pickens Trust
Nancy and Dick Bechtolt
June Bonyor
Mary Boyle and Ted Arnn
P. James and Barbara Brady
Twig and Barbara Branch
Mr. and Mrs. John E. Britton
The Byham Family
Chautauqua County Visitors’ Bureau
Chautauqua Dance Circle
Geoff and Kathie Church
Marty and Sandy Coyle
The Crockett Family
Kevin and Karen Crowder
Dr. Barb Mackey
John W. and Yvonne S. McCredie
Robert and Sally Metzgar
Miriam S. Reading and Richard H. Miller
The Milos Family Fund
George E. and Susan Moran
Murphy
Ralph H. and Elizabeth C. Norton
Philanthropic Trust
Steve and Anne Odland
Office Depot Foundation, Inc.
Sheila Penrose and Ernie Mahaffey
Larry and Bonnye Roose
Mr. and Mrs. H. Parker Sharp
Mr. and Mrs. J. Bruce Stromgren
Mr. and Mrs. Henry B. Suhr, Jr.
Robert and Joyce Tate Family Foundation
Town of Chautauqua
The Turney Family
Caroline Van Kirk Bissell
Mr. and Mrs. Robert O. Wilder
Mr. and Mrs. John R. Cummings
Laura and Brad Currie
Richard and Marty Davis
Mr. and Mrs. Joseph H. DeFrees
June and Barry Dietrich
Elizabeth Elser Doolittle
Charitable Trust
Shirley A. and Arthur R. Duffy
Lora Lee and Bob Duncan
Arthur E. Earley
Mr. and Mrs. James L. Flynn
Jane Fortune
Dr. and Mrs. Myron B. Franks
vic and Joan gelb
Karen and Tim Goodell
S. Allen Goodwin
Jim and Elisabeth Groninger
Becky and Fred K. Habenicht, Jr.
Kathleen E. Hancock
Ms. Verna Harrah
Lisa Heinz
The Hermance Family Foundation
Bill and Angela James
The Johnson Foundation
W. Alton Jones Foundation
Kevin and Joan Keogh
Ron and Rosie Kilpatrick
William M. Kinley
Mary Kuhns Trust
Blossom Leibowitz
J. Stoner Lichty, Jr. and Darryl L. Raszl, M.D.
Mrs. John C. Lincoln
Kathryn Lincoln
Helen T. Logan Charitable Trust
James H. Lynch, Jr.
Alison and Craig Martinsen
Chris and Sue Martin
Warren K. Martin
Dr. and Mrs. Frank E. McElree, Jr.
Edward and Betsy Merchant
Cornelia Chason Miller
Ministrare, Inc.
Miss Jane C. Morgan
Mr. and Mrs. Lewis W. Morgan
National Endowment for the Arts
The John R. Oishei Foundation
The Estate of Gail Clement Olson
Robert A. Ott, Jr.
The Mary and James Pardo Charitable Gift Fund
Mr. and Mrs. William H. Park
Deloras Pemberton
Gloria Plevin
PNC Financial Services Group
Richard A. and Esther M. Popp
Sam and Petey Price
Mrs. Lois Raynow
Mr. and Mrs. Bartlett Richards, Ill
Mrs. Bartlett Richards
Molly F. Rinehart and Charles L. Christian
Marjorie McCarthy Robins
Joseph H. and Florence E. Roblee Foundation
Herbert B. and Gerda Sachse
Mr. and Mrs. Ralph C. Sheldon, Jr.
The Jessie Smith Darrah Fund
Dr. Robert G. and Katy T. Smith
Sutton Trust
Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
Susan and John Turben Foundation
VACI Partners
Tara VanDerveer
John and Linda Wadsworth
Dr. and Mrs. Robert J. Weiss
Norman and Marilyn Weizenbaum
The Margaret L. Wendt Foundation
The Mary S. Wilsdon Trust
Virginia H. and Robert R. Young
Mr. and Mrs. Howard Zemsky
Shirley and Sam Zemsky
Steve Zenczak and Patricia Feighan
Financial Overview

The Foundation adopted Accounting Standards Update (ASU) 2016-14 – Presentation of Financial Statements for Not-for-Profit Entities in the fiscal year ended March 31, 2019, which resulted in three significant changes to the presentation of the financial statements; (1) Net asset categories changed to with and without donor restrictions, (2) all investment management fees were netted against interest and dividends, and (3) the expenses by nature and function footnote replaced the supplemental schedule of expenses.

The net assets of the Foundation surpassed $100 million as of the fiscal year ended March 31, 2019, increasing by $4.4 million during the fiscal year. Outright gifts received in addition to amounts received from endowment receivables totaled $5.9 million in endowment contributions received during the fiscal year.

Contributions receivable includes $7.2 million for endowment, which represents $13.9 million of unconditional endowment receivables, net a discount of $6.7 million. The $13.9 million of unconditional endowment receivables combined with $40.2 million of conditional endowment receivables, represents a total of $54.1 million expected to be received in future years from cash pledges, the pooled life income fund, trusts, bequests, and other planned gifts.

Also, during the fiscal year, the Foundation has been preparing for the transition of the development staff to the Institution. As part of this transition, the Foundation has decided to change its fiscal year end from March to December. The fiscal year change will be effective on January 1, 2020, creating a short year financial period from April 1, 2019 through December 31, 2019. The Foundation believes the primary benefit of this change is to align the reporting of investment performance and fundraising with financial reporting on a more commonly used time period. Despite the shift of development expense from the Foundation to the Institution, total spending from endowment will remain the same, allowing the Foundation to increase direct support from endowment to the Institution. The goal remains to balance the delivery of the maximum amount possible to the Institution and the Foundation’s responsibility to long-term sustainability.

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 the amount of $54.1 million as of March 31, 2019. 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 44-46.
Endowment Net Assets
The net asset balance of the 743 active endowment funds as of March 31, 2019, was $91 million. This balance represents the sum total of each endowment fund as of March 31, 2019. Endowment funds are comprised of board-designated and donor restricted endowments to be held in perpetuity for the benefit of the Institution. This chart represents the allocation of the total net asset balances of active endowment funds as of March 31, 2019 by area of support.

Support to the Institution
The Foundation’s spending includes direct and indirect support to the Institution and administrative costs of running the Foundation. Indirect support represents the costs incurred by the Foundation in providing development services on behalf of the Institution.

Direct support from the endowment for program represents distributions to the Institution toward the operating budget for both specified and unspecified purposes. The Foundation utilizes the constant growth method for determining the annual direct support to the Institution, which involves increasing the distribution each year by an inflation factor and new gifts received. In 2019, direct support from endowment of $2 million was withdrawn from net assets without donor restrictions for support of Amphitheater capital costs as approved by the Foundation Board of Directors.

The amount to be distributed from other restricted funds is determined annually by the donors and the Foundation. In 2018, the amount distributed from other restricted funds included the transfer of Miller Edison Cottage from the Foundation to the Institution.

<table>
<thead>
<tr>
<th>Budget Area</th>
<th>3/31/19</th>
<th>3/31/18</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Direct Support to the Institution</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support from Endowment</td>
<td>$2,383,407</td>
<td>$2,248,910</td>
</tr>
<tr>
<td>Support from Board-designated Endowment</td>
<td>2,000,000</td>
<td>-</td>
</tr>
<tr>
<td>Support from Other Restricted Funds</td>
<td>48,583</td>
<td>1,590,433</td>
</tr>
<tr>
<td>Annual Support from the Chautauqua Fund</td>
<td>4,962,944</td>
<td>4,884,685</td>
</tr>
<tr>
<td><strong>Total Direct Support</strong></td>
<td>$9,394,934</td>
<td>$8,724,028</td>
</tr>
<tr>
<td><strong>Indirect Support to the Institution</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Expense</td>
<td>$1,634,906</td>
<td>$1,531,382</td>
</tr>
<tr>
<td>Reimbursement by the Institution</td>
<td>(350,000)</td>
<td>(350,000)</td>
</tr>
<tr>
<td><strong>Total Indirect Support</strong></td>
<td>$1,284,906</td>
<td>$1,181,382</td>
</tr>
</tbody>
</table>
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 $97.3 million in invested assets, comprised of the following portfolios:

1) Endowment ($92.7 million)
Individual endowment funds are pooled for investment purposes and tracked with unit accounting. This pooled approach enables endowment funds to collectively benefit from the diversification and efficiencies that are available to larger investors. Each endowment fund receives its proportionate share of return based on the market value of the endowment as a percentage of the total market value of the investment portfolio.

2) Temporarily restricted ($1.4 million)
Other restricted funds are held and managed separately from the main endowment in one of two portfolios, employing conservative investment strategies. One portfolio is primarily held in cash and the other portfolio is invested in bonds as well as cash.

3) Pooled life income fund ($3.2 million)
The management and investment strategy of the pooled life income fund (PLIF) is reviewed annually with Key Private Bank. At March 31, 2019, 43% of the PLIF assets were invested in equities, 52% in fixed income assets and 5% in alternative investments.

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 and the other restricted funds. The remaining portion of the main endowment is invested in a funds of hedge funds, managed by Pointer Management, LLC. The pooled life income fund is managed by Key Private Bank.

**Endowment Investment Portfolio**

This chart represents the endowment investment portfolio in thousands, which has grown by $51.4 million over the past 15 years, from $41.3 million as of March 31, 2004, to $92.7 million as of March 31, 2019.
Endowment Asset Allocation

Total endowment portfolio market value was $92.7 million as of March 31, 2019, 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 benchmark the committee uses to assess performance is net of fees and is diversified based on the strategic allocation of the Russell 3000, MSCI EAFE, HFR Strategic and BarCap Aggregate Bond indices. The benchmark is currently weighted 30% Russell 3000, 30% MSCI EAFE, 20% HFR Strategic and 20% BarCap Aggregate Bond.

<table>
<thead>
<tr>
<th></th>
<th>3/31/15</th>
<th>3/31/16</th>
<th>3/31/17</th>
<th>3/31/18</th>
<th>3/31/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Return</td>
<td>6.0%</td>
<td>3.7%</td>
<td>3.9%</td>
<td>4.7%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Benchmark</td>
<td>5.3%</td>
<td>3.4%</td>
<td>3.2%</td>
<td>4.3%</td>
<td>8.8%</td>
</tr>
</tbody>
</table>
The Audit Committee reviewed and discussed the audited financial statements for the fiscal year ended March 31, 2019 with management and Lumsden & McCormick, LLP (L&M), the Foundation’s independent auditor. The committee also concluded that L&M’s provision of non-audit services, including tax preparation, is compatible with L&M’s independence. The audited financial statements follow.

The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of March 31, 2019 and 2018, 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, 2019 and 2018 and the changes in its net assets and cash flows for the years then ended, in accordance with accounting principles generally accepted in the United States of America.

June 18, 2019
## Statements of Financial Position

### March 31,

#### Assets:

<table>
<thead>
<tr>
<th>Description</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$ 1,978,465</td>
<td>$ 1,720,567</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>7,640,422</td>
<td>5,208,808</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>94,516,172</td>
<td>91,682,240</td>
</tr>
<tr>
<td>Other assets</td>
<td>377,653</td>
<td>422,303</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$ 104,512,712</strong></td>
<td><strong>$ 99,033,918</strong></td>
</tr>
</tbody>
</table>

#### Liabilities and Net Assets:

#### Liabilities:

<table>
<thead>
<tr>
<th>Description</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable to the Institution (Note 4)</td>
<td>$ 4,058,506</td>
<td>$ 2,821,243</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>368,250</td>
<td>352,274</td>
</tr>
<tr>
<td>Amounts held in custody for others (Note 5)</td>
<td>-</td>
<td>195,203</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$ 4,426,756</strong></td>
<td><strong>$ 3,368,720</strong></td>
</tr>
</tbody>
</table>

#### Net Assets (Note 6):

<table>
<thead>
<tr>
<th>Description</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without donor restrictions</td>
<td>$ 4,391,263</td>
<td>$ 6,438,324</td>
</tr>
<tr>
<td>With donor restrictions</td>
<td>95,694,693</td>
<td>89,226,874</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>100,085,956</strong></td>
<td><strong>95,665,198</strong></td>
</tr>
</tbody>
</table>

### $ 104,512,712   $ 99,033,918

See accompanying notes.
## Statements of Activities

For the year ended March 31, 2019

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>$</td>
<td>-</td>
<td>$</td>
</tr>
<tr>
<td>Endowment</td>
<td>14,294</td>
<td>5,888,605</td>
<td>5,902,899</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>-</td>
<td>2,539,654</td>
<td>2,539,654</td>
</tr>
<tr>
<td>Total contributions</td>
<td>14,294</td>
<td>13,391,203</td>
<td>13,405,497</td>
</tr>
<tr>
<td>Interest and dividends, net</td>
<td>76,200</td>
<td>1,282,251</td>
<td>1,358,451</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>35,903</td>
<td>719,949</td>
<td>755,852</td>
</tr>
<tr>
<td>Total revenues</td>
<td>126,397</td>
<td>15,393,403</td>
<td>15,519,800</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct support:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>4,962,944</td>
<td>-</td>
<td>4,962,944</td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>4,383,407</td>
<td>-</td>
<td>4,383,407</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>48,583</td>
<td>-</td>
<td>48,583</td>
</tr>
<tr>
<td>Indirect support</td>
<td>1,284,906</td>
<td>-</td>
<td>1,284,906</td>
</tr>
<tr>
<td>General and administrative</td>
<td>419,202</td>
<td>-</td>
<td>419,202</td>
</tr>
<tr>
<td>Total expenses</td>
<td>11,099,042</td>
<td>-</td>
<td>11,099,042</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>8,925,584</td>
<td>(8,925,584)</td>
<td>-</td>
</tr>
<tr>
<td>Change in net assets</td>
<td>(2,047,061)</td>
<td>6,467,819</td>
<td>4,420,758</td>
</tr>
<tr>
<td>Net assets - beginning</td>
<td>6,438,324</td>
<td>89,226,874</td>
<td>95,665,198</td>
</tr>
<tr>
<td>Net assets - ending</td>
<td>$ 4,391,263</td>
<td>$ 95,694,693</td>
<td>$ 100,085,956</td>
</tr>
</tbody>
</table>

See accompanying notes.
For the year ended March 31, 2018

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Assets</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Without Donor Restrictions</td>
<td>With Donor Restrictions</td>
<td>Total</td>
</tr>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>$</td>
<td>-</td>
<td>$ 4,884,685</td>
</tr>
<tr>
<td>Endowment</td>
<td>280,328</td>
<td>3,691,876</td>
<td>3,972,204</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>162,257</td>
<td>162,257</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>-</td>
<td>251,927</td>
<td>251,927</td>
</tr>
<tr>
<td>Total contributions</td>
<td>280,328</td>
<td>8,990,745</td>
<td>9,271,073</td>
</tr>
<tr>
<td>Interest and dividends, net</td>
<td>77,966</td>
<td>1,007,945</td>
<td>1,085,911</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>252,320</td>
<td>6,930,947</td>
<td>7,183,267</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td>610,614</td>
<td>16,929,637</td>
<td>17,540,251</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct support:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>4,884,685</td>
<td>-</td>
<td>4,884,685</td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>2,248,910</td>
<td>-</td>
<td>2,248,910</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>1,590,433</td>
<td>-</td>
<td>1,590,433</td>
</tr>
<tr>
<td>Indirect support</td>
<td>1,181,382</td>
<td>-</td>
<td>1,181,382</td>
</tr>
<tr>
<td>General and administrative</td>
<td>380,534</td>
<td>-</td>
<td>380,534</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>10,285,944</td>
<td>-</td>
<td>10,285,944</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>10,190,847</td>
<td>(10,190,847)</td>
<td>-</td>
</tr>
<tr>
<td>Change in net assets</td>
<td>515,517</td>
<td>6,738,790</td>
<td>7,254,307</td>
</tr>
<tr>
<td>Net assets - beginning</td>
<td>5,922,807</td>
<td>82,488,084</td>
<td>88,410,891</td>
</tr>
<tr>
<td><strong>Net assets - ending</strong></td>
<td>$ 6,438,324</td>
<td>$ 89,226,874</td>
<td>$ 95,665,198</td>
</tr>
</tbody>
</table>

See accompanying notes.
For the years ended March 31,

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating activities:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td>$4,420,758</td>
<td>$7,254,307</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>(755,852)</td>
<td>(7,183,267)</td>
</tr>
<tr>
<td>Support to the Institution - property transfer</td>
<td>-</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Changes in other operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>(2,431,614)</td>
<td>(182,462)</td>
</tr>
<tr>
<td>Other assets</td>
<td>44,650</td>
<td>(35,514)</td>
</tr>
<tr>
<td>Payable to the Institution</td>
<td>1,237,263</td>
<td>277,683</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>15,976</td>
<td>(111,874)</td>
</tr>
<tr>
<td>Amounts held in custody for others</td>
<td>(195,203)</td>
<td>(145,751)</td>
</tr>
<tr>
<td>Net operating activities</td>
<td>2,335,978</td>
<td>1,373,122</td>
</tr>
</tbody>
</table>

|                                |              |              |
| **Investing activities:**      |              |              |
| Purchases of investments       | (7,642,573)  | (10,930,799) |
| Proceeds from sales of investments | 5,564,493  | 10,455,487  |
| Net investing activities       | (2,078,080)  | (475,312)    |
| Net change in cash             | 257,898      | 897,810      |
| Cash - beginning               | 1,720,567    | 822,757      |
| Cash - ending                  | $1,978,465   | $1,720,567   |

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.

Subsequent Events:
The Foundation has evaluated events and transactions for potential recognition or disclosure through June 18, 2019, the date the financial statements were available to be issued.

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.

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

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

Conditional promises to give to the Foundation are not recorded as revenue until such time as the conditions are substantially met, and totaled $40,262,000 and $38,503,000 at March 31, 2019 and 2018.

Support to the Institution:
All Chautauqua Fund contributions are distributed to the Institution in the same year they are received by the Foundation. Annual distributions from the restricted endowment funds are made pursuant to the Foundation’s spending policy guidelines and donor stipulations. All other distributions are made in accordance with donor restrictions and for purposes approved by the Foundation’s Board.

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

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

Reclassification:
The financial statements for the year ended March 31, 2018 have been reclassified to conform with the presentation adopted for 2019.

2. Contributions Receivable:

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pooled life income funds</td>
<td>$3,226,747</td>
<td>$3,292,845</td>
</tr>
<tr>
<td>Charitable remainder trusts</td>
<td>7,146,635</td>
<td>7,044,258</td>
</tr>
<tr>
<td>Unconditional promises to give</td>
<td>3,967,566</td>
<td>1,448,247</td>
</tr>
<tr>
<td></td>
<td>14,340,948</td>
<td>11,785,350</td>
</tr>
<tr>
<td>Less discount</td>
<td>6,700,526</td>
<td>6,576,542</td>
</tr>
<tr>
<td></td>
<td>$ 7,640,422</td>
<td>$ 5,208,808</td>
</tr>
</tbody>
</table>

Contributions receivable at March 31, 2019 are expected to be received over the periods shown below:

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>$1,206,969</td>
</tr>
<tr>
<td>One through five years</td>
<td>2,760,597</td>
</tr>
<tr>
<td>Greater than five years</td>
<td>10,373,382</td>
</tr>
<tr>
<td></td>
<td>$14,340,948</td>
</tr>
</tbody>
</table>

17
3. Investments:

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketable securities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$ 2,923,593</td>
<td>$ 3,378,727</td>
</tr>
<tr>
<td>Equities</td>
<td>44,904,739</td>
<td>44,876,734</td>
</tr>
<tr>
<td>Fixed income securities</td>
<td>16,538,288</td>
<td>14,042,821</td>
</tr>
<tr>
<td>Alternative investments</td>
<td>29,800,543</td>
<td>29,042,480</td>
</tr>
<tr>
<td>Other</td>
<td>349,009</td>
<td>341,478</td>
</tr>
<tr>
<td></td>
<td>$ 94,516,172</td>
<td>$ 91,682,240</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></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redeemable semiannually with 105 days notice</td>
<td>$ 11,297,217</td>
<td>$ 11,099,617</td>
</tr>
<tr>
<td>Redeemable annually with 95 days notice</td>
<td>-</td>
<td>429,491</td>
</tr>
<tr>
<td>Illiquid with return of capital beginning 3 to 4 years from commitment date</td>
<td>9,740,222</td>
<td>8,923,547</td>
</tr>
<tr>
<td>Redeemable semiannually with 105 days notice after lock-up period of 2 years</td>
<td>8,763,104</td>
<td>8,589,825</td>
</tr>
<tr>
<td></td>
<td>$ 29,800,543</td>
<td>$ 29,042,480</td>
</tr>
</tbody>
</table>

The Foundation has committed capital of approximately $18,980,000 to private equity alternative investments. As of March 31, 2019, the remaining obligation under these commitments totaled approximately $5,850,000.

4. Payable to the Institution:

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income and principal</td>
<td>$ 3,377,838</td>
<td>$ 2,259,511</td>
</tr>
<tr>
<td>Income from prior periods</td>
<td>680,668</td>
<td>561,732</td>
</tr>
<tr>
<td></td>
<td>$ 4,058,506</td>
<td>$ 2,821,243</td>
</tr>
</tbody>
</table>

5. 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 2019 and 2018 by the Institution for development services the Foundation provided to the Institution. These amounts are included as a receivable in other assets and as a reduction of 2019 and 2018 development expenses in the accompanying statements of financial position and activities, respectively.

As of March 31, 2018, the Foundation guaranteed a promissory note payable by the Institution totaling $222,780. During 2019, amounts held by the Foundation on behalf of the Institution totaling $195,203 were transferred to the Institution and the promissory note was paid in full.

In May 2016, the Foundation obtained a $25,000,000 bank revolving credit note to facilitate financing the renovation of the Institution’s Amphitheater. The note is available until April 1, 2022 and has step down provisions to $15,000,000 on April 1, 2020 and $5,000,000 on April 1, 2021. The note bears interest at the LIBOR flex rate plus 1%, and contains a covenant requiring the Foundation to maintain a minimum balance in marketable securities or cash of $25,000,000. Additionally, the Foundation provides a negative pledge on all of its assets, and the note is guaranteed by the Institution. During 2018, draws on the line totaled $4,400,000 and there were no draws in 2019. No borrowings on the arrangement were outstanding at March 31, 2019, and March 31, 2018.

Pursuant to a promissory note entered into between the Foundation and Institution, all amounts advanced under the bank revolving credit note for the benefit of the Institution will be repaid to the Foundation with interest at the Internal Revenue Service’s applicable federal rate for mid-term borrowings. Total interest recognized during the years ended March 31, 2019 and 2018, were $5,569 and $55,224.
6. Net Assets:
The Foundation’s financial position and activities are reported according to two classes of net assets: net assets without donor restrictions and net assets with donor restrictions. Net assets with donor restrictions are those whose use has been limited by donors for a specified time period, purpose or to be maintained by the Foundation in perpetuity.

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

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board-designated endowments</td>
<td>$3,431,848</td>
<td>$5,508,969</td>
</tr>
<tr>
<td>Unrestricted gifts</td>
<td>959,415</td>
<td>929,355</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$4,391,263</strong></td>
<td><strong>$6,438,324</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$7,737,839</td>
<td>$9,174,751</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>2,466,109</td>
<td>2,948,671</td>
</tr>
<tr>
<td>Other restricted gifts</td>
<td>744,323</td>
<td>806,989</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$10,948,271</strong></td>
<td><strong>$12,930,411</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$62,161,489</td>
<td>$54,397,932</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>22,584,933</td>
<td>21,898,531</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$84,746,422</strong></td>
<td><strong>$76,296,463</strong></td>
</tr>
</tbody>
</table>

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level the donor requires the Foundation to retain as a fund of perpetual duration. The Foundation permits spending from underwater endowment funds unless otherwise precluded by donor intent or relevant laws. Deficiencies of this nature exist in 25 donor-restricted endowment funds, which together have an original gift of $4,636,220 and a deficiency of $86,110 as of March 31, 2019.

7. 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 $93,000 and $91,000 for the years ended March 31, 2019 and 2018.

8. 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, 2019 and 2018, were determined based on quoted prices in active markets.
9. Endowment Assets:

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

The Foundation's Board has interpreted the New York 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 net assets with donor restrictions (a) the original value of gifts donated to be maintained in perpetuity, (b) the original value of subsequent gifts to the endowment fund, and (c) accumulations to the endowment fund made in accordance with the direction of a donor gift instrument at the time the accumulation is added to the fund.

In accordance with NYPMIFA, the Foundation considers the following factors to appropriate or accumulate donor-restricted endowment funds:

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

Investment activity is allocated among the endowment assets based upon their proportionate share of the investment portfolio. Investment activity related to the board-designated endowment is shown as an increase (decrease) in net assets without donor restrictions. Investment income related to the donor-restricted endowments is reported as an increase (decrease) to net assets with donor restrictions until appropriated in accordance with the Foundation's spending policy. The Foundation's endowment investment assets activity for the years ended March 31, 2019 and 2018, is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Board-designated</td>
<td>Unappropriated Earnings on Perpetual Endowments</td>
</tr>
<tr>
<td>2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment assets – beginning of year</td>
<td>$5,508,969</td>
<td>$12,123,422</td>
</tr>
<tr>
<td>Investment income</td>
<td>91,874</td>
<td>1,994,581</td>
</tr>
<tr>
<td>Contributions</td>
<td>14,294</td>
<td>-</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(2,183,289)</td>
<td>(3,914,055)</td>
</tr>
<tr>
<td>Endowment assets – end of year</td>
<td>$3,431,848</td>
<td>$10,203,948</td>
</tr>
<tr>
<td>2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment assets – beginning of year</td>
<td>$5,002,841</td>
<td>$8,082,776</td>
</tr>
<tr>
<td>Investment income</td>
<td>565,270</td>
<td>8,103,779</td>
</tr>
<tr>
<td>Contributions</td>
<td>280,328</td>
<td>-</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(339,470)</td>
<td>(4,063,133)</td>
</tr>
<tr>
<td>Endowment assets – end of year</td>
<td>$5,508,969</td>
<td>$12,123,422</td>
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</tbody>
</table>
10. Financial Assets Available for Operating Purposes:
The Foundation obtains financial assets primarily through contributions and investment income. The financial assets are acquired throughout the year to help meet the Foundation’s cash needs to provide direct and indirect support to the Institution and for general expenditures in accordance with the Foundation’s spending policy.

11. Expenses by Nature and Function:

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Direct Support</td>
<td>Indirect Support</td>
<td>General and Administrative</td>
</tr>
<tr>
<td>Fund appropriations</td>
<td>$9,394,934</td>
<td>$ -</td>
<td>$ -</td>
</tr>
<tr>
<td>Personnel costs</td>
<td>-</td>
<td>1,071,711</td>
<td>304,629</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>-</td>
<td>179,155</td>
<td>43,791</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>-</td>
<td>207,952</td>
<td>43,480</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>176,088</td>
<td>27,302</td>
</tr>
<tr>
<td>Reimbursement by the Institution</td>
<td>-</td>
<td>(350,000)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$9,394,934</td>
<td>$1,284,906</td>
<td>$419,202</td>
</tr>
</tbody>
</table>

|                | 2018                      |          |          |
|                | Direct Support | Indirect Support | General and Administrative | Total       |
| Fund appropriations | $8,724,028 | $ - | $ - | $ 8,724,028 |
| Personnel costs | - | 1,034,006 | 276,737 | 1,310,743 |
| Travel and hospitality | - | 192,720 | 34,448 | 227,168 |
| Professional and consulting | - | 125,306 | 40,159 | 165,465 |
| Other | - | 179,350 | 29,190 | 208,540 |
| Reimbursement by the Institution | - | (350,000) | - | (350,000) |
| **Total** | $8,724,028 | $1,181,382 | $380,534 | **10,285,944** |

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

UNSPECIFIED FUNDS
$26,044,374 Assets
$1,051,700* Support to the Institution

* Includes support provided to the Institution for development services.

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

- Paul M. Alexander Fund
- Mary Apple Fund
- Katherine G. Bailey Fund
- Arthur S. & Barbara F. Banner Endowment for Chautauqua
- Robert and Je’Anne Bargar Endowment
- Zoe and Ken Barley Endowment
- Beatrice B. Bates Fund
- Nancy and Dick Bechtolt Fund
- Thomas and Jane Becker Endowment
- Josephine A. Bell Endowment for Chautauqua
- Bemus Fund for Chautauqua
- Gordon Benn Fund
- Alan J. and Mary Hough Blair Fund
- The Erika Block Fund for Chautauqua
- Martha Borowsky Endowment Fund
- Bosland Family Fund
- Boyle Family Fund
- Barbara A. and Patrick James Brady III Endowment for Chautauqua
- Sara E. Bradley Endowment for Chautauqua
- Barbara and William Branch Fund
- Daniel and Wanita Bratton Endowment
- Lillian Brink Endowment Fund
- Gary M. and Willow R. Brost Endowment for Chautauqua
- Henrietta T. Campbell Fund
- Maxine M. Carleton Fund
- Katharine J. Carnahan Endowment
- Barbara P. and Howard E. Chadwick Fund
- Genevieve Chaney Fund
- Julia and William Clinger Fund
- Marion and Eugene Cohen Fund
- Ruth K. Collyer Endowment
- Jack and Marcia Connolly Fund for Chautauqua
- The Mildred K. Cooper Fund for Chautauqua
- William F. and Thelma L. Cooper Endowment for Chautauqua
- Helen and George L. Cornell Fund
- Katharine and Robert W. Cornell Fund
- Sarah A. Corns Fund
- Martha S.H. Cowles Fund
- Helen T. and Ralph E. Crockett Endowment
- Laura and Brad Currie Endowment for Chautauqua
- Elizabeth Danielson Fund
- Charles and Rebecca Denton Endowment for Chautauqua
- Dietrich Family Endowment at Chautauqua
- Martha T. and Morgan O. Doolittle Fund
- Lora Lee and Bob Duncan Endowment
- Ann O. Edison Endowment
- Albert C. Elser II Fund
- Cordelia C. Ensign Fund
- James E. Erickson Fund
- Helen C. Estabrook Fund
- Agnes H. and Hal A. Fausnaugh Fund
- Fetterolf Family Fund
- George L. Follansbee, Jr. and Gay E. Didget Endowment for Chautauqua
- James L. Flynn and Shirley Mix Flynn Endowment for Chautauqua
- Gelb Family Endowment for Chautauqua
- William R. and Betsy Callicott Goodell Endowment
- Kathleen M. and Donald C. Greenhouse Endowment for Chautauqua
- Jean Edgcumbe Groff Endowment for Chautauqua
- Groninger Family Fund
- Habenicht Family Fund
- Felicia Grace Hall Fund
- Tirzah H. Hall Fund
- Sarah R. Hankey Fund for Chautauqua
- Diana and Samuel Harbison Endowment
- Walter O. and Joan S. Harf Fund
- Heber R. Harper Fund
- Drs. Thomas J. and Patricia H. Hasbach Endowment for Chautauqua
- Eleanor McKnight Haupt Endowment for Chautauqua
- Lisa Heinz Endowment for Chautauqua
- Dorothy S. and William F. Hill, II Endowment for Chautauqua
- Holden Family Fund
- The Burritt and Joanne Hubbard Family Fund
- Margaret A. Hukill Endowment for Chautauqua
- Charles R. Hunter, Jr. Fund
- Esther M. Huntoon Fund
- Verna Jackson Memorial Endowment for Chautauqua
- James Family Fund
- Donald D. Jansen Endowment for Chautauqua
- Katherine King Karslake Fund
- Ronald L. and Rosie C. Kilpatrick Endowment
- Georgiana Bole King Endowment
- The Lawrence G. Knecht Fund
- Knox Family Endowment
- Frank and Bitsy Koehler Endowment for Chautauqua
- Konneker Fund
- Mary E. Kuhrs Fund
- Robert and Susan Laubach Endowment
- LeClere Family Endowment
- The Lemonade Fund
- Elizabeth S. & Reginald A. Lenna Fund
- Stella C. Logan Fund
Sara M. and Robert S. Lucas Fund
Stan and Sara Lundine Fund
Lyndall Family Fund
Ann and Charles H. Lytle Endowment
Jeannette B. Mainwood Fund
Gerald and Dorothea Maloney Endowment
Clara Masik Endowment
• Mary E. McCarn Fund
Mary Jane and Donald McClurg Endowment
Margaret C. Mercer Endowment
Richard H. Miller Fund
Dawson E. Charlotte B. Molyneaux Endowment
Jane C. Morgan Fund
Lewis W. & Katherine C. Morgan Fund
James R. Morris III Fund
The George E. and Susan Moran Murphy Family Fund
Orlov Family Fund for Chautauqua
Robert B. and June A. Osburn Fund
Robert Pace Endowment Fund
Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
Mary C. and William H. Park Fund
Mary Lou Cady Parlato Endowment for Chautauqua
Charles E. and Gladys W. Peirce Fund
Donald R. Pembridge and Rosalie H. Pembridge Endowment for Chautauqua
Margaret Penn Fund
Sheila Penrose and Ernest Mahaffey Endowment for Chautauqua
Steven W. and Barbara P. Percy Endowment for Chautauqua
Helen Pickup-Hyman Fund
Mary Ellen Pindyck Fund
Sam and Petey Tinkham Price Family Fund
• Evelyn Joyce Ramsdell Fund
Mary Oram Reading Fund
• Agnes H. Reigart Fund
Renjillian Family Fund
Elaine Y. Rieser Endowment for Chautauqua
William Rittman Fund
Mary Ritts Endowment
Walter Roberts Fund
David M. and Sarah A. Rosen Endowment for Chautauqua
Stephanie Rosenblatt Fund
• Doris H. Ruslink Fund
Harper G. and Blanche Billings Rusterholtz Fund
• Herbert B. Sachse Fund
Howie and Bobby Schiller Endowment for Future Generations of Chautauquans
Newton B. Schott, Jr. and Antoinette L. LeQuire-Schott Endowment
Barbara and John Schubert Endowment Fund
Dr. O. Peter Schumacher Fund
• Helene J. Schwartz Endowment for Chautauqua
Mary Jo Schweizer Endowment for Chautauqua
Jo and Bill Selnick Fund
Emma O. and H. Parker Sharp Fund
Jane R. and Walter C. Shaw, Jr. Fund
Ralph C. Sheldon, Jr. Fund
• Dorothy E. Shepherd Fund
Allen and Elaine Short Endowment for Chautauqua
Bert W. and Joanne R. Simons Endowment
Elizabeth M. Smith Memorial Endowment for Chautauqua
J. Vance Smith and Robert M. Smith Fund
George T. and Margaret D. Snyder Endowment for Chautauqua
Nancy Coburn Snyder Endowment Fund
Thomas H. and Joan Stevens Family Endowment for Chautauqua
• Betty P. and J. Bruce Stromgren Fund
Ann H. and Daniel F. Sullivan Endowment for Chautauqua
The Robert C. and Patricia D. Switzer Family Fund
Tate Family Fund
Eleanor M. Thomas Fund
The Susan and John Turben Foundation Endowment for Chautauqua
Joseph & Elizabeth Verlie Endowment
Carl A. and Mary Louise Viehe Family Endowment
Debby and Dick Wade Endowment for Chautauqua
Nina and Norman Wain Family Endowment for Chautauqua
Carol and Bill Ward Endowment for Chautauqua
Evelyn Wargo Endowment
Charles and Lois Weaver Fund
Nina T. Wensley Fund
Helen N. White Fund
Robert O. Wilder Family Fund
• The Mary S. Wilsdon Fund for Chautauqua
Betty Offutt Wood and BRAVAS Endowment for Chautauqua
Henry L. Wood Fund
John B. Yoder Endowment for Chautauqua
Robert and Virginia Young
The Deborah and Allen Zaretsky Fund
Stephen J. Zenczak and Patricia E. Feighan Endowment for Chautauqua
General Endowment Fund
Every Gift Matters:

DAVID AND FERN JAFFE ENDOWMENT FOR CHAUTAUQUA

When David and Fern Jaffe were living in Cleveland, David was in the midst of a medical fellowship and Fern was expanding her midwifery practice at Case Western Reserve and Kaiser Permanente. Busy professionals, they declined several offers extended by David’s colleague to check out a small, lakeside community in Western New York. Thanks to some persistence, they were eventually convinced to come and see Chautauqua for themselves. Now, more than 30 years later, the Jaffes have visited the grounds annually for many years as one-week renters, now celebrating 10 years owning their Irving Place cottage overlooking the lake… and they couldn’t image it any other way.

While Fern spends every spare moment at Chautauqua dutifully converting the property surrounding their cottage into native gardens, David prefers quiet moments to simply “veg” on the porch with a book or the newspaper. Belying their active days of cycling, kayaking and attending lectures and other programming in the Amphitheater or Hall of Philosophy lawn, the couple is rooted by the refuge afforded in their corner of paradise.

This refuge has inspired David and Fern to invest in Chautauqua, first as members of the Bestor Society and most recently by naming the Institution as a beneficiary of a planned gift. David, a retired anesthesiologist, and Fern, a nurse midwife, are hopeful their three grown children — one of whom was married this summer — will continue their Chautauqua pilgrimages and benefit from the atmosphere of intellectual curiosity, inclusivity and natural beauty they enjoy here.

Affirming the totality of the Chautauqua experience, the Jaffes’ gift to unspecified endowment and the gardens celebrates that every aspect of Chautauqua must be tended to, and that the Chautauqua left behind for generations who follow is supported with the flexibility to evolve, adapt and contribute to the continued exploration of the best of human values.
## SPECIFIED FUNDS

$65,438,651 Assets
$2,377,839 Support to the Institution

New funds are designated in **orange**.

### PHYSICAL MAINTENANCE FUNDS

$12,126,200 Assets
$427,104 Support to the Institution

<table>
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<th>Buildings and Structures</th>
<th>$10,186,277 Assets</th>
<th>$357,266 Support to the Institution</th>
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</thead>
<tbody>
<tr>
<td>Amphitheater Endowment Fund</td>
<td></td>
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<tr>
<td>Jack G. and Elizabeth L. Armstrong Fund for Youth Facilities</td>
<td></td>
<td></td>
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<tr>
<td>Bellinger Hall Maintenance Endowment</td>
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<td></td>
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<tr>
<td>The Francis and Susan Bonsignore Youth Facilities Fund</td>
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<td></td>
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<tr>
<td>Bratton Theater Endowment Fund</td>
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<tr>
<td>Carnahan-Jackson Endowment for Dance Studio Maintenance</td>
<td></td>
<td></td>
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<tr>
<td>Chautauqua Opera Guild Endowment for Connolly Residence Hall</td>
<td></td>
<td></td>
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<tr>
<td>Children's School Fund</td>
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<td></td>
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<tr>
<td>The CLSC Class of 2000 Mosaic Fund</td>
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<tr>
<td>Mary E. Collier Memorial Fund</td>
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<tr>
<td>Connolly Residence Hall Endowment</td>
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<tr>
<td>Coyle Pavilion Fund</td>
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<tr>
<td>Crowder Family Foundation Fund for Youth</td>
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<tr>
<td>Department of Religion Physical Facilities Fund</td>
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<tr>
<td>Mina Miller Edison Fund</td>
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<td></td>
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<tr>
<td>The Dorothy J. Forney Memorial Fund</td>
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<tr>
<td>Fowler-Kellogg Art Center Endowment</td>
<td></td>
<td></td>
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<tr>
<td>The Joseph and Anna Gartner Foundation Endowment for Bonnefoix-McBride Hall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Golf Course Maintenance and Growth Fund</td>
<td></td>
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<tr>
<td>The Seth A. and Helen F. Goodwin Fund to Maintain the Pier Building</td>
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<tr>
<td>Kitty and Blkie Greenberg Amphitheater Endowment</td>
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<td></td>
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<tr>
<td>Hagen-Wensley Guest House Endowment</td>
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<td></td>
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<tr>
<td>Helen Heinz Sample Fund</td>
<td></td>
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<tr>
<td>Hitchcock Room Maintenance Fund</td>
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<tr>
<td>The Forest B. Irwin Fund for Bowling Green Maintenance</td>
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<tr>
<td>The Knox Fund for Youth Facilities</td>
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<tr>
<td>Elizabeth S. Lenna Hall Endowment Fund</td>
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<tr>
<td>The Helen Colvill Lincoln Fund to Maintain Lincoln Memorial Dormitory</td>
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</table>

### Specific Gardens and Parks

$1,400,271 Assets
$49,326 Support to the Institution

<table>
<thead>
<tr>
<th>Specific Gardens and Parks</th>
<th>$1,400,271 Assets</th>
<th>$49,326 Support to the Institution</th>
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<tr>
<td>The Reid B. Babcox Memorial Garden Terrace Endowment</td>
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<tr>
<td>The Bell/Ritts Garden Fund</td>
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<tr>
<td>Arline and Ralph Bernstein Memorial Rain Garden Fund</td>
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<tr>
<td>The Bishop's Garden Fund</td>
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<tr>
<td>Selina W. Braham Memorial Garden Fund</td>
<td></td>
<td></td>
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<tr>
<td>Judge W. Walter Braham Garden Fund</td>
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<tr>
<td>Dr. Daniel and Wanita Bratton Garden Fund</td>
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<td>The Henrietta T. Campbell Garden Fund</td>
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<tr>
<td>Carnahan-Jackson Memorial Garden Fund</td>
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<td>The Carothers Family Garden Fund</td>
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<tr>
<td>The Kirk David Casto Memorial Garden Fund</td>
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<tr>
<td>Jean Chadwick Memorial Garden Fund</td>
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<tr>
<td>The CLSC Class of 1982 Helen W. Giacobine Garden Fund</td>
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<td></td>
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<tr>
<td>Connolly Family Gardens and Fountains Endowment</td>
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<tr>
<td>The Cornell Garden Fund</td>
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<tr>
<td>DeeDee's Garden Endowment</td>
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<tr>
<td>The Ehrenreich Family Fund</td>
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<tr>
<td>The Fausnaugh Family Garden Fund</td>
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<td></td>
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<tr>
<td>J. Marcus and Ellen Bernstein Fultz Family Gardens</td>
<td></td>
<td></td>
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<tr>
<td>Peggy Foley Memorial Garden Fund</td>
<td></td>
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<tr>
<td>The Jean Rice Goodell Garden Fund</td>
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<tr>
<td>The Robert Y. Gromet Family Garden Fund</td>
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<tr>
<td>The Mary Kimball Haker Memorial Garden Endowment Fund</td>
<td></td>
<td></td>
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<tr>
<td>The Eleanor McKnight Haupt Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Holden Garden Fund</td>
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<tr>
<td>Patricia K. Ives Memorial Beautification Fund</td>
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<tr>
<td>Melvin Johnson Sculpture Garden Endowment</td>
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<tr>
<td>Henrietta Ord Jones Memorial Fund</td>
<td></td>
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</tbody>
</table>
The JoAnn Jubell Memorial Fund
The Judson Park Fund
Ryan Kiblin Memorial Stormwater Park Endowment
Janet F. and Arthur C. LeVan, Sr. Garden Fund
Joan Lincoln Garden Fund
The Wilfred B. McCune Memorial Garden Fund
Miller Edison Cottage Garden Endowment
Mary Louise Molyneaux Garden Fund
Penneys Garden Endowment
Ride/Savage Memorial Garden Fund
Timothy Ritacco Play Area Endowment
The Michael M. Ross Garden Fund
The Mme. Shao Fang Sheng Garden Fund
Toni Sterman Memorial Garden
The Stephen Toms Garden Fund
Randall E. Widig Memorial Garden Fund
Nancy Hyde Wilbur Memorial Fund
The Dr. Alan Winkelstein Garden Fund
The Roy and Dorothy Wissel Garden Fund
The Frank Lloyd Wright Garden Fund
The Frank Lloyd Wright School of Architecture and Taliesin Fellowship Garden Fund

General Grounds And Gardens
$539,652 Assets
$20,512 Support to the Institution
D.A.R. Flag Fund
Garden Beautification Fund
Lake, Grounds, and Public Spaces Endowment
Louise Marshall Lincoln Memorial Garden Fund
The Constance Lincoln Newbury Memorial Garden Fund
The Walter C. Shaw, Jr. Family Tree Fund
Tree Fund

EDUCATION & YOUTH FUNDS
$13,278,059 Assets
$490,450 Support to the Institution

Lectureships
$9,627,103 Assets
$359,579 Support to the Institution
10:45 Lecture Platform Endowment
Malcolm Anderson Lecture Fund
The Sondra R. and R. Quintus Anderson Lectureship
Helen S. and Merrill L. Bank Lectureship
David and Wendy 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 Eleanor Fund Lectureship Endowment
The Foglesong Family Lectureship Fund
The Chip and Gail Gamble Lecture Endowment
Barbara A. Georgescu Lectureship Endowment
The Charles Ellsworth Goodell Lectureship in Government and Public Affairs
The Susan Hirt Hagen Lectures Fund
The Thomas L. Hagner and Linda Ulrich-Hagner Lectureship Fund
Travis E. and Betty J. Halford Lectureship Endowment
G. Thomas and Kathleen Harrick Lectureship Endowment
The Dr. Robert R. Hesse Lectureship
The Higie Family Lectureship
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
Deloras K. and L. Beaty Pemberton Lectureship
Kathryn Sisson Phillips Memorial Lectureship Fund
The Richard and Emily Smucker Endowment Fund
Marjorie and Frank Sterritte Lectureship
The Ethel Paris and Theodore Albert Viehe Lectureship
John M. Wadsworth Lectureship on Free Market and Libertarian Principles
The Dorothy M. Wissel Lectureship
### Literary Arts
**$1,206,036 Assets**  
**$45,876 Support to the Institution**  
The Baird-Fuller Memorial Fund  
Caroline Roberts Barnum and Julianne Barnum Follansbee Fund  
The Alice M. Bentley CLSC Memorial Fund  
John H. Bliss Memorial Fund  
Lowell & Frances Hyams Brentano Library Fund  
Chautauqua Literary Arts Endowment  
Chautauqua Prize Endowment Fund  
C.L.S.C. Class of 1940 Endowment Fund  
C.L.S.C. Class of 1948 Endowment Fund  
Court Family Internship Endowment  
The Louise Shaw Van Kirk Dill Fund  
The Paul and Mary Jean Irión 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
**$613,781 Assets**  
**$23,059 Support to the Institution**  
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  
Julius A. and Carol L. Nicolai Boys’ and Girls’ Club Endowment  
The Popp Family Fund  
Paul L. Sample Memorial Fund  
Andrew and Donna Sorensen Youth Activities Center Endowment  
James R. and Alison T. Steadman Boys’ and Girls’ Club Endowment  
The Laurence and Maria Wagner Family Fund  
Youth Activities Fund

### Other
**$1,831,139 Assets**  
**$61,936 Support to the Institution**  
Lillian Brink Education Fund  
Barbara R. Foorman Science Literacy Endowment  
McCreddie Family Director of Boys’ and Girls’ Club  
Emily and Richard Smucker Directorship for Education

### FINE & PERFORMING ARTS FUNDS
**$18,781,164 Assets**  
**$666,346 Support to the Institution**

#### General
**$4,011,027 Assets**  
**$128,942 Support to the Institution**  
The John T. and Katherine G. Bailey Family Fund  
Stacey and Evie Berger Endowment for Emerging Artists  
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  
John Alfred and Emily McKnight Corry Fund for Opera  
The Helen Cooper Johnson Memorial Trust  
The Lenna Fund for the Performing Arts  
The John T. and Katherine G. Bailey Family Fund  
The Barbara Baldwin DeFrees Fund for Opera  
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

#### Opera
**$4,266,834 Assets**  
**$162,571 Support to the Institution**  
A. Chace & Josephine B. Anderson Opera Endowment Fund  
John E. Anderson Opera Endowment  
The Peggy and Andy Anderson Family Fund for Opera  
The Cynthia Auerbach Fund for Opera  
Bemus Endowment for Opera  
Anne and John Burden Opera Fund  
Chautauqua Opera Endowment Fund  
The Chautauqua Opera Guild Endowment  
Thomas and Kathleen Clingan Fund for Opera  
The Connolly Family Fund For Opera  
The John A. and Emily McShane Corry Opera Fund  
The Barbara Baldwin DeFrees Opera Fund  
The Walter F. Ferchen Opera Fund  
The Eleanor B. Franks Fund for the Opera  
The James and Elisabeth Groninger Fund for Opera  
The Jane A. Gross Opera Endowment  
The Kay Frantz Israel Fund for Opera  
The Mildred Lesenger Fund for Opera  
The Kay H. Logan Opera Fund  
The Annette Pickens Malvin Memorial Fund for Opera  
The Christopher and Susan Martin Opera Fund
The Margaret Clark Mercer Fund for Opera  
The Ralph E. Miller and Paul E. Cawein Fund for Opera  
The Steve Z. and Mary G. Mitchell Family Fund  
The Reverend Lloyd V. Moffett Opera Endowment Fund  
The Robert G. and Lillian Vitanza Ney Family Opera Fund  
The Joseph A. and Anne T. Prezio Opera Endowment Fund  
The Richards Family Opera Fund  
The Molly Rinehart Fund for Opera  
The Wadsworth Fund  
Charles Weaver and Family Fund for Opera  
Dr. Fred R. Whaley and Helen A. Whaley Fund for Opera  
The Robert and Virginia Young Opera Fund  
Zemsky Endowment For Opera

**Symphony**  
$4,840,802 Assets  
$183,606 Support to the Institution

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  
Shirley A. and Arthur R. Duffy Endowment for Classical Guitar  
Heitzenrater Family Chautauqua Symphony Orchestra Fund  
The William M. Kinley Fund for the Chautauqua Symphony Orchestra  
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  
The Mischakoff/Taylor Concertmaster Chair Fund  
Music School Festival Orchestra Fund  
Frances and George Newman Endowment for the Chautauqua Symphony Orchestra  
Margaret Miller Newman Fund for the Chautauqua Symphony Orchestra  
The David B. and Barbara Barrett Orr Music Fund  
Av and Janet Posner Fund for the Chautauqua Symphony Orchestra  
The Reinberger Fund for the Performing Arts  
The Gertrude Aldredge Shelburne Fund  
**Dan and Linda Silverberg Chautauqua Symphony Orchestra Endowment**  
The Dr. James and Mary Anne Evans Singleton Fund for the Chautauqua Symphony Orchestra  
Symphony Patron Endowment Fund for the Chautauqua Symphony Orchestra  
The Trustees’ Fund for the Chautauqua Symphony Orchestra  
Rita and Dunbar VanDerveer Symphony Principal Chair for Flute  
Mary E. Whitaker Symphony Endowment Fund  
The Wilder Family Fund for the Chautauqua Symphony Orchestra  
Nora J. Williams Symphony Fund  
Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra

**Theater**  
$1,426,951 Assets  
$54,197 Support to the Institution

The Arnold and Jill Bellowe Fund for Theater  
The Nancy E. Brewer Fund for Theater  
Chautauqua Theater Fund  
Court Family Endowment  
The Crockett Family Fund for Theater  
The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming  
**Terrie Vaile Hauck Theater Endowment**  
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**  
$1,207,984 Assets  
$46,053 Support to the Institution

The Paul and Toni Branch Fund for Dance  
The Carnahan-Jackson Dance Chair Endowment  
The Carnahan-Jackson Dance Endowment  
Dakin Family Fund for Dance  
**Terrie Vaile Hauck Dance Endowment**  
**Moore Fund for Dance**

**Visual Arts**  
$2,027,327 Assets  
$71,912 Support to the Institution

Je’Anne Griffin Bargar Endowment for Visual Arts  
The Chautauqua Art Association, Inc. Visual Arts Fund  
Shirley Mix Flynn Visual Arts Endowment  
Chip and Gail Gamble Visual Arts Endowment  
Joan and David Lincoln Ceramics Endowment  
Florence H. Norton and Cynthia Norton Visual Arts Endowment  
**Sydelle Sonkin and Herb Siegel Artistic Director of the Visual Arts**  
Susan and John Turben Director of the VACI Galleries Endowment
OTHER
$1,000,239 Assets
$19,065 Support to the Institution
Heintzelman Family Piano Fund
Anne Capper McIntosh and Walter Stevenson McIntosh
Endowment for Voice

RELIGION FUNDS
$5,789,986 Assets
$216,832 Support to the Institution

General
$1,380,569 Assets
$52,430 Support to the Institution
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
$1,083,529 Assets
$41,199 Support to the Institution
Marie Reid-Edward Spencer Babcox Memorial Fund
Gladys R. Brasted and Adair Brasted Gould Memorial Chaplaincy
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
$1,368,996 Assets
$52,007 Support to the Institution
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
$1,956,892 Assets
$71,196 Support to the Institution
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 Jack and Gretchen Grigsby Fund for Choral Enrichment
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
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
$7,184,402 Assets
$266,543 Support to the Institution
A. Chace Anderson Fine and Performing Arts Scholarship
Peggy and Andy Anderson Family Scholarship Fund
Richard W. Antemann Memorial Scholarship
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<td>Barakat Scholarship</td>
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<td>Barton Family Scholarship</td>
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<td>The Anne C. Britton Memorial Scholarship</td>
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<td>The Carnahan-Jackson Scholarship Fund</td>
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<td>David and Miriam Yanes Eddleman Voice Scholarship</td>
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<td>Ted and Deborah First Scholarship</td>
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<td>Edith Reid Flaster Memorial Dance Scholarship</td>
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<td>The Luella Morris Forney Memorial Scholarship</td>
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<td>Dr. Stephen Fudell Memorial Scholarship Endowment</td>
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<td>The Harriet B. and Ralph T. Geller Memorial Scholarship</td>
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<td>The Elizabeth &amp; Jack Gellman and Deborah &amp; Allen Zaretsky Scholarship Fund</td>
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<td>The Groff-Simpson Family Scholarship</td>
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<td>G. Thomas &amp; Kathleen Harrick Music Scholarship</td>
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<td>Harris Scholarship for Performing Arts</td>
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<td>Ruth Higby Haver and Della and David Higby Music Scholarship</td>
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<td>Lillian B. Hersh Music Scholarship</td>
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<td>William and Pauline Higie School of Dance Scholarship</td>
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<td>Robert D. Hiller Scholarship Fund</td>
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<td>The Arthur and Arlene Holden Scholarship for Chautauqua</td>
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<td>W.T. Holland Memorial Piano Scholarship Endowment</td>
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<td>Elke Kieserling Hoppe Scholarship</td>
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<td>Cyril T.M. Hough Memorial Scholarship Fund</td>
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<td>Ruth M. Skinner Hutchins Scholarship Fund</td>
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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 Koblitz Scholarship
Konnerke 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 Anne Mary and Richard M. Maddy Music Scholarship Fund
Marianne Elser Markham Endowment Fund
Lillian W. Masters Scholarship Fund
The Lucille J. McClure Memorial Music Scholarship Fund
Roberta J. McKibbin Memorial Scholarship for Visual Arts
Everett and Sarah Holden McLaren Scholarship
Samuel R. McClure II Brass Scholarship
David L. and Janet K. Miller Art Scholarship
Laurie Miller Piano Scholarship
Laurie Miller Voice 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
Charles John Petre Memorial Fund Trombone Award
William and Jane Pfefferkorn Scholarship for Music
The Ernest W. and Jeannette McClure Polley Scholarship
Av and Janet Posner Art Scholarship
Henry Rauch Memorial Scholarship
The Douglas A. Raynow Memorial Scholarship
Robert D. Redington Memorial Scholarship
Joseph W. and Marilyn Hyder Richey Scholarship Endowment
Rizzolo Family Fund
Roblee Scholarship for Families
Joseph H. and Florence A. Roblee Scholarship
The Catherine Prussing Rodgers Scholarship
The Josette and Ronald Rolley Scholarship
Mary McQueen Ross Scholarship
Glen and Ruth Roush Scholarship Fund
The Richard B. Rubin Scholarship Fund
The Sack Family Scholarship
Ann and Isidor Saslaw Violin Scholarship in Honor of Mischa Mischakoff
The Henrietta W. Schlager Scholarship
The Charles G. Schwartz Scholarship
Kuniko Washio Scollard Scholarship Fund for Music
The Sabina Mooney Seifert Memorial Scholarship
Shreveport Friends’ Music Scholarship
A. Pope and Peggy B. Shuford Dance Scholarship
Ronald Perry Smith Scholarship Fund
The Dr. William T. and Virginia W. Smyth Fund
Soulful Bliss Fund
The Suzanne Gaider Sroka Scholarship
The Madge Ryan Stirniman Scholarship
George and Marianne Strother Scholarship Fund
Dessie B. Tichenim Scholarship Fund
Tustin Memorial Fund
Alfredo Valenti Scholarship Fund
Glenn G. Vance Music Scholarship Fund
Nina T. Wensley Scholarship
Katherine Karslake White School of Music Scholarship
The Drs. Frits & Corrie Wiebenga Scholarship Fund
The Rachel Wilder and Phil Lerman Scholarship
Victoria Willen Scholarship Fund for the Arts
The Mark W. Williams Scholarship
Mary Chenoweth Wright Scholarship Endowment
The Harriet G. Yanes Dance Scholarship
The John B. Yoder Music Scholarship
Chadwick Young Scholarship
FLEXIBLE PROGRAM FUNDS
$4,688,182 Assets
$176,702 Support to the Institution

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
Craig and Cathrine Greene Family Fund
The Jane Robb Shaw Hirsh Endowment
The Jim and Lynn Gasche Levinson Fund for Chautauqua
Locke-Irwin Fund
The Loynd Family Fund
Jeffrey Lutz and M. Cathy Nowosielski, MD Endowment 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

OTHER SPECIFIED FUNDS
$3,590,658 Assets
$133,862 Support to the Institution

Allegheny Jazz Society Fund
Barakat Fund
Jane and Tom Becker Endowment for Amphitheater Programs
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
Gwin Family Fund
Charles Heinz and Louise Heinz Lockhart Fund
The Frank G. Karslake Fund

TEMPORARILY RESTRICTED FUNDS
$285,181 Assets
$20,135 Support to the Institution

The Wendy Cohen Fund
Fowler Kellogg Maintenance Fund
Candace Littell and Scott Maxwell Endowment Fund
Miller Edison Cottage Fund
Jack Bailey and his late wife, Kay, always said that there are two principal things that brought them back to Chautauqua year after year — one was the quality and variety of the musical offerings, and the second was Chautauqua Lake.

In memory of Kay, Jack Bailey has created the John T. and Katherine G. Bailey Family Fund for Jazz at Chautauqua. This endowment gift will be used to support jazz of a high caliber as a regular part of Institution programming. Jack, who spent his 93rd summer on the grounds in 2019, represents a distinguished Chautauqua family spanning five generations, beginning with Jack’s grandfather, the artist and educator Henry Turner Bailey, who oversaw the design and building of the Arts Quadrangle in 1909 and who served as the first director of visual arts at the Institution.

Jack Bailey — who ran his own public relations firm for many years in Cleveland — calls jazz a unique American art form, having an important impact on our society in the way we think, the way we dance and the way we listen to music. An avocational teacher of jazz appreciation, both at Chautauqua and in Sanibel, Florida, his lifelong love of jazz began with Louis Armstrong and Duke Ellington and expanded to embrace all of the great players of the 20th century, including Benny Goodman, Charlie Parker, Miles Davis and the contemporary jazz icon Wynton Marsalis.

Noting its special mix of harmony, rhythm, and improvisation unlike that found in any other form of music, Jack wanted this fund directed toward making jazz a more influential part of the Chautauqua program, growing the audience for jazz and deepening that audience’s understanding of the history and impact of jazz in American culture.
The following donors have contributed $10,000 or more to the endowment of the Chautauqua Foundation. We thank them for perpetuating the idea and place of Chautauqua. These totals include gifts received, pledged, transferred to the pooled life income fund and certain planned gift commitments made since May 1937.

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

<table>
<thead>
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<th>Greater than $2,500,000</th>
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<td>The Carnahan-Jackson Foundation</td>
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<td>Emily and John Corry</td>
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<td>Joan and David Lincoln</td>
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<td>Patty and Spencer Van Kirk, III</td>
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<th>$1,000,000 to $2,499,999</th>
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<td>Mr. and Mrs. Robert W. Cornell</td>
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<td>Mary and Oliver Langenberg</td>
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<td>Mr. and Mrs. Robert M. Smith</td>
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<td>Ginny Stahlsmith</td>
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<td>Lowell and Rebecca Strohl and Family</td>
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<td>Dr. Barb Mackey</td>
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<td>Miriam S. Reading and Richard H. Miller</td>
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<td>Mr. and Mrs. Robert O. Wilder Foundation</td>
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<td>$250,000 to $499,999</td>
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<td>Sandy and Quint Anderson</td>
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<td>Arthur and Barbara Banner</td>
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<td>Nancy and Dick Bechtolt</td>
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<td>June Bonyor</td>
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<td>Ms. Lilian Brink</td>
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<td>Gary and Willow Brost Charitable Fund</td>
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<td>William M. Kinley</td>
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<td>Warren K. Martin</td>
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<td>The Estate of Gail Clement Olson</td>
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<td>Sheila Penrose and Emie Mahaffey</td>
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<td>Sam and Petey Price</td>
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<td>The Mary S. Wilsdon Trust</td>
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<td>Virginia H. and Robert R. Young</td>
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<td>$100,000 to $249,999</td>
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<td>Anonymous (2)</td>
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<td>Paul M. Alexander</td>
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<td>Erika Block</td>
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<td>Cathy Bonner and Ken Wendler</td>
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George Heintzelman has been coming to Chautauqua on a nearly annual basis since the summer of 1982. In 2010, George and his wife, Margaret Clarkson, who live on Long Island, purchased a house on Warren Avenue, where they enjoy spending time each summer with George’s parents, his two sisters and their children.

Appreciators of piano performance, the family also shares a natural talent as instrumentalists. Margaret plays the piano and for a time was involved in teaching music to children under the age of 5 and their families. George’s mother, Jane Heintzelman, is a professional piano teacher, and for many years has annually looked forward to participating in the piano master classes and attending performances at Sherwood Marsh Studios, where the Piano Program is headquartered. Jane also taught George to play, and he continues to play the piano for personal enjoyment.

In 2012, when the Piano Program was in transition and was shortened to five weeks, the Heintzelmans shifted their summer visits to include Week Five whenever possible, but the family missed many performances. They were worried at first about the future prospects for piano at Chautauqua, but witnessed leadership’s commitment to the highest possible quality in instruction as well as the caliber of musicians who attended.

In honor of Jane’s birthday last year, George and Margaret endowed the position of Artistic Advisor and Artist-in-Residence in Chautauqua’s Piano Program, currently held by Alexander Gavrylyuk. Gavrylyuk’s position has been named the Heintzelman Family Artistic Advisor of the School of Music Piano Program, working closely with co-chairs of the program, Nicola (Nikki) Melville and John Milbauer. The Heintzelman family’s gift is also supporting an extension of the program from five to six weeks beginning in 2019. This past year, the program received the greatest number of applicants ever, a testament to the level of excellence and returning number of students who find value in their experience at Chautauqua.

The Piano Program has developed a fresh momentum and is reaching ever-higher standards. The infusion of resources provided by this new endowment is an affirmation of the incredible collaborative team that is now working with our exceptional students from around the globe.
The Foundation expresses sincere appreciation to the many individuals, corporations, and foundations whose cash gifts to endowment were received during fiscal year 2019. We extend our thanks to these many contributors for their generous support — the very reason for our continued success.

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Judith L. Hanson
Walter and Joan Harf
Thomas and Patricia Hasbach
Terrie Vaile Hauck
Paula and Ray Hecker
William and Anne (Mischakoff) Heiles
Dorothy and Bill Hill
Dr. and Mrs. Robert Hirt
Sallie L. Holder
Sidney and Anita Van Tassel Holec
Robert Hopper
Kathleen Howard
Cheryl S. and Carl W. Huber, Jr.
Pat and Jay Hudson
Gale T. Hurst
Diane Hussey
Don and Mary Hustead
Robert and Joy Ingersoll
Wilmot W. Irish
Margaret M. Irwin
Robert Ivers
David and Fern Jaffe
Bob and Gretchen Jahrling
Catherine Jarjisian
Bob Jeffrey
Karim A. Johnson
Barbara and Walter Jones
Lucille Jordan
John F. and Mary Giegengack Jureller
Jeannette D. Kahlenberg
Norman and Nancy Karp
Bill and Martha Karslake
Judy and Leonard Katz
Naomi Kaufman
Joan Keogh
Jane and Chaz Kerschner
Subagh Khalsa and Linda Winkelstern
Patricia L. King
The Foundation gratefully acknowledges endowment contributions made in memory of the following:

Herbert R. and Lorraine H. Weier
Claude Welch
Cynthia C. and Terry R. White
Lee Chaverin White
Heather L. Whitehouse and Caroline M.K. Le Vasseur

Dr. Jeanne Wiebenga
Mark Williams
Dent and Joan Williamson
Lou B. Wineman
Sally L. Wissel
Susan O. Wood
Shirley Musgrave Woolaway

Nancilee Wydra
Caroline Young
Robert and Donna Zellers
Stephen Zenczak and Patricia Feighan
Burt and Sandi Zucker
Barbara Zuegel

2019 HONORARY GIFTS

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

Lenore T. Adams
Stephen C. Ames
Robert and Mary Bargar
Betsy Burgesson
Joe and Toni Goldfarb
Alfred E. Goldman
Karen Goodell

Jane B. Heintzelman
Karen L. and Richard P. Heitzenrater
Susan Helm
Louise Jackson
Simran and Moses Kagan
David and Kathryn Levy

Darby Lin O’Donnell
Isabel Pedersen
Suzanne Shull
Ann Slonaker
Caroline Van Kirk Bissell
Richard O. Wood

2019 MEMORIAL GIFTS

The Foundation gratefully acknowledges endowment contributions made in memory of the following:

SueAnn Wooster Ames
Andy Anderson
Kay Bailey
Joan Karslake Beauchamp
Judge Don Castor
Ted Colborn
Clarence Danford
Marcia Epstein
Nancy Follansbee
vic gelb
Peter Haas
Judy Hazlett
Bill Higie
Mary Ellen Ivers
Dorothy M. Jackson
Dr. Donald West King

Tilda Klaus
David and Joan Lincoln
Kay Logan
Craig Luchsinger
Jeannette Ludwig
Mary Ann McCabe
Edward McCarthy
Walter McIntosh
Laurie Ariane Miller
Tass and Lewis Morgan
Udora Morris
Rosalie Pembridge
Robert Perkins
Bob Reeder
Nicholas Rieser
Mary Jo Schweizer

Jeffrey Simpson
Daniel Sklar
Barbara Thoburn
Ken Wendler
Mary Whitaker
Tom Wineman
Betty O. Wood
Every Gift Matters:

**BARBARA R. FOORMAN SCIENCE LITERACY ENDOWMENT**

At a time when the Institution is thinking critically about how to enhance the role of science in an interdisciplinary approach to programming alongside the arts, humanities and religion, lifelong Chautauquan Barbara Foorman has recently stepped forward to help build the foundation for multigenerational science education at Chautauqua.

Barbara, the Frances Eppes Professor of Education at Florida State University, has created the Barbara R. Foorman Science Literacy Endowment at Chautauqua to be used for the purpose of building science literacy through lecture programming, including morning and CLSC author presentations, science education and mentoring programs, and related support to science education for all ages.

With a distinguished academic career and a personal desire that people of all ages know more about their world and how the scientific method can play a role in solving problems, she encourages people to think scientifically, keeping an open mind as they examine and test various ideas.

Topics in science have been a powerful part of the lecture platform at Chautauqua in recent years, particularly through recent partnerships with organizations such as National Geographic and the Stanford Center on Longevity.

Barbara hopes that through her endowment, and with additional investments from other donors, enhanced scientific literacy can inform everyone’s Chautauqua experience, from youth programs to the CLSC to Special Studies offerings, building audience members’ knowledge and capacity as citizens to effect change in their communities and world.
## Directors and Term Expires

<table>
<thead>
<tr>
<th>Directors</th>
<th>Term Expires</th>
</tr>
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<tbody>
<tr>
<td>David W. Anderson of Hingham, Massachusetts • 2, 3, 5, 6</td>
<td>2019</td>
</tr>
<tr>
<td>Chair, Nominating &amp; Governance Committee</td>
<td></td>
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<tr>
<td>Cathy Bonner of Austin, Texas • 2, 3, 4, 5, 7</td>
<td>2021</td>
</tr>
<tr>
<td>Chair, Executive Committee</td>
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<tr>
<td>Chair, Board of Directors</td>
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<tr>
<td>Andrew L. Camden of Grosse Pointe, Michigan • 3, 5</td>
<td>2021</td>
</tr>
<tr>
<td>Chair, Investment Committee</td>
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<tr>
<td>Lauren Rich Fine of Shaker Heights, Ohio • 1, 5, 7</td>
<td>2020</td>
</tr>
<tr>
<td>Charles S. Gamble of Dunedin, Florida • 4, 5</td>
<td>2020</td>
</tr>
<tr>
<td>Karen J. Goodell of New York, New York • 2, 3, 6</td>
<td>2021</td>
</tr>
<tr>
<td>Chair, Development Council</td>
<td></td>
</tr>
<tr>
<td>William R. Goodell of San Francisco, California • 4, 5</td>
<td>2022</td>
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<tr>
<td>John Haughton of Buffalo, New York • 2, 4, 6</td>
<td>2022</td>
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<tr>
<td>Michael E. Hill of Washington, D.C. and Chautauqua, New York - ex officio • 2, 3, 6</td>
<td>2020</td>
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<tr>
<td>William M. James of New York, New York • 1, 6</td>
<td>2022</td>
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<tr>
<td>Craig Marshinsen of Toronto, Ontario • 4, 5</td>
<td>2022</td>
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<tr>
<td>John A. Milos of Orange Village, Ohio • 2, 7</td>
<td>2019</td>
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<tr>
<td>Anne Odland of Washington, D.C. • 1, 3</td>
<td>2022</td>
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<tr>
<td>Chair, Audit Committee</td>
<td></td>
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<tr>
<td>M. Timothy Renjian of Atlanta, Georgia • 1, 5, 6</td>
<td>2019</td>
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<tr>
<td>Anne Hoyt Scavone of New York, New York • 4, 7</td>
<td>2022</td>
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<tr>
<td>Sheila Schroeder of San Francisco, California • 5, 6</td>
<td>2021</td>
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<tr>
<td>George T. Snyder of Pittsburgh, Pennsylvania • 3, 4, 7</td>
<td>2021</td>
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<tr>
<td>Chair, Personnel Committee</td>
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<tr>
<td>Richard Wade of Fountain Hills, AZ • 1, 4, 7</td>
<td>2020</td>
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<tr>
<td>Stephen J. Zenczak of Gates Mills, Ohio • 3, 4</td>
<td>2019</td>
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<tr>
<td>Chair, Finance Committee</td>
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</tbody>
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1 - Audit Committee  5 - Investment Committee  
2 - Development Council  6 - Nominating & Governance Committee  
3 - Executive Committee  7 - Personnel Committee  
4 - Finance Committee

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## Officers

<table>
<thead>
<tr>
<th>Officers</th>
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<tbody>
<tr>
<td>Chair, Nominating &amp; Governance Committee</td>
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<tr>
<td>Cathy Bonner • Chair</td>
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<tr>
<td>Karen J. Goodell • Vice Chair</td>
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<tr>
<td>George L. Follansbee, Jr. • Chief Executive Officer</td>
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<tr>
<td>Deborah E. Moore, CPA • Treasurer &amp; Chief Financial Officer</td>
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<tr>
<td>Theresa Frangione • Corporate Secretary</td>
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## Staff

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<tbody>
<tr>
<td>Joshua C. Auflick • Prospect Research Manager</td>
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<tr>
<td>Chris J. Baglia • Gift Administrator</td>
<td></td>
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<tr>
<td>Karen M. Blozie • Senior Major Gifts Officer</td>
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<tr>
<td>Jennifer L. Burgeson • Finance and Data Management Assistant</td>
<td></td>
</tr>
<tr>
<td>Jacqueline A. Chagnon • Director of Stewardship and Donor Relations</td>
<td></td>
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<tr>
<td>Christine A. Doolittle • Chautauqua Fund Administrative Project Manager</td>
<td></td>
</tr>
<tr>
<td>Tina Downey • Director of the Chautauqua Fund</td>
<td></td>
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<tr>
<td>George L. Follansbee, Jr. • Chief Executive Officer</td>
<td></td>
</tr>
<tr>
<td>Theresa M. Frangione • Corporate Secretary and Executive Assistant to the CEO</td>
<td></td>
</tr>
<tr>
<td>Amy Gardner • Associate Vice President for Major and Planned Gifts</td>
<td></td>
</tr>
<tr>
<td>Joanna M. Kaufmann • Stewardship and Events Coordinator</td>
<td></td>
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<tr>
<td>Jared Magoon • Assistant Director of the Chautauqua Fund</td>
<td></td>
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<tr>
<td>Debbie Meyers • Assistant Vice President for Advancement Operations</td>
<td></td>
</tr>
<tr>
<td>Deborah E. Moore, CPA • Chief Financial Officer</td>
<td></td>
</tr>
<tr>
<td>Tamara J. Silzle • Gift Planning Administrative Assistant</td>
<td></td>
</tr>
<tr>
<td>Megan E. Sorenson • Director of Donor Communications and Community Engagement</td>
<td></td>
</tr>
<tr>
<td>Jennifer S. Stitely, CFRE • Director of Gift Planning</td>
<td></td>
</tr>
<tr>
<td>Maggie R. Stokes • Database Specialist</td>
<td></td>
</tr>
<tr>
<td>Nicole K. Szydlo • Director of Development Operations</td>
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</tr>
</tbody>
</table>

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

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OFFICERS, DIRECTORS AND STAFF
FORMER DIRECTORS

Former Directors and Terms of Service

Wilson C. Price • May 1937 to August 1962
Mrs. E.J. Bellinger • August 1937 to October 1963
Mrs. L. D. Boal • August 1937 to August 1955
Samuel M. Hazlett • August 1937 to July 1956
James H. Matthews • August 1937 to 1939
Walter Roberts • August 1937 to March 1959
David L. Starr • August 1937 to 1951
Mrs. Livingston Hunter • August 1939 to 1942
Mrs. Dorothy Smith • August 1943 to 1950
Walter F. Rittman • August 1950 to September 1954
Harold F. Reed • August 1951 to August 1971
Mrs. Walter F. Rittman • August 1955 to January 1964
Paul N. Anderson • August 1955 to August 1965
Walter C. Shaw, Jr. • August 1956 to August 1974
John D. Hamilton • July 1959 to August 1971
Samuel P. Price, Sr. • August 1962 to August 1995
Mrs. Dorothy W. Cook • August 1964 to August 1987
Lewis W. Morgan • August 1964 to August 1990
Nancy Miller Amn • 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
James G. Groninger • August 1994 to August 2014
William G. Karslake • August 1994 to August 1995
Thomas R. Bromeley • August 1995 to June 2001
vic gelb • August 1995 to August 2011
Selina P. Johnson • August 1996 to August 2008
Wilfred R. Konneker • January 1996 to August 2006
Lowell K. Strohl • August 1996 to February 2010
Miriam S. Reading • January 1997 to August 2006
Susan Moran Murphy • August 1998 to August 2018
Martin Coyle • August 2000 to November 2003
Wendy Cohen • August 2001 to May 2011
Scott McVay • January 2001 to December 2003
Allen Short • August 2001 to August 2005
John S. Connolly, Jr. • August 2003 to August 2018
Fred C. Gregory • August 2004 to August 2008
Thomas M. Becker • January 2005 to December 2016
Christopher H. Lytle • February 2005 to August 2014
John W. Burden, III • August 2005 to October 2007
Kathryn J. Lincoln • August 2005 to December 2011
I. Hale Oliver • August 2005 to August 2013
George T. Snyder • August 2006 to August 2007
Steven W. Percy • August 2007 to August 2015
John A. Corry • January 2008 to August 2013
Charlotte A. Fowler • August 2008 to December 2012
John E. Anderson • August 2008 to August 2016
Gary M. Brost • May 2010 to August 2016
Thomas B. Hagen • June 2011 to August 2017
John S. Kobacker • August 2011 to September 2016
Laura P. Currie • June 2012 to August 2017
P. James Brady • August 2015 to August 2016
Georgia M. Court • August 2016 to October 2017

Former Board Leadership

Walter Roberts
August 1937 to August 1957

John D. Hamilton
August 1967 to August 1971

William F. Hill, II
August 1996 to August 2002

Steven W. Percy
August 2008 to August 2015

Harold F. Reed
August 1957 to August 1967

Richard H. Miller
August 1971 to August 1996

Lowell K. Strohl
August 2002 to August 2008

Edward P. Boyle
August 1984 to August 1994

Former Directors

Walter Roberts
August 1937 to August 1957

John D. Hamilton
August 1967 to August 1971

William F. Hill, II
August 1996 to August 2002

Steven W. Percy
August 2008 to August 2015

Harold F. Reed
August 1957 to August 1967

Richard H. Miller
August 1971 to August 1996

Lowell K. Strohl
August 2002 to August 2008
2020 Annual Membership Meeting
Saturday, August 15 • 9 a.m.
One Ames Avenue
P. O. Box 28
716.357.6220 • 716.357.4023 (fax)
foundation@chq.org
chautauquafoundation.org

Photo: Greg Funka