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Former Directors  
STATEMENT OF PURPOSE

Article II, Corporate Charter May 14, 1937

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

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

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

III To hold such property and to invest and reinvest the same and receive the income thereof and to pay said income, less proper expenses, at least annually to the Chautauqua Institution, Chautauqua, New York, for the furtherance of its corporate purposes; except that, if this corporation acquires property for particular purposes or subject to specific conditions, neither said property nor the income therefrom shall be paid or transferred to the Chautauqua Institution, unless said Institution fulfills such purposes and conditions. If Chautauqua Foundation, Inc., receives property, by gift, devise or bequest, subject to conditions or for specific purposes, which conditions and purposes the Chautauqua Institution fails, refuses or has not the corporate power to observe or carry out, such property shall be disposed of as directed by any court having jurisdiction.

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

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

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

MISSION STATEMENT

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

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

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

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

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

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

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

In the discharge of its responsibilities, the Chautauqua Foundation will be guided by the Chautauqua Challenge as adopted by the Board of Trustees. The Foundation will be dedicated to quality and integrity in all of its internal and external relationships. The Foundation will anticipate and accept change while maintaining an understanding and appreciation of the history of the Chautauqua Institution in general and the Foundation in particular.
Dear Friends,

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

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

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

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

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

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

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

Sincerely,

Steven W. Percy,
Chairman

Geof Follansbee,
Chief Executive Officer
Total Philanthropic Activity

Total philanthropy includes new cash gifts, new pledges recorded, and new planned gifts. It consists of 3 categories of giving: (1) Chautauqua Fund, (2) endowment, and (3) capital and other. The capital and other gifts are made directly to the Institution, primarily supporting the renovation or construction of facilities and also supplementing the operating budget for extraordinary program initiatives. Gifts to the endowment are made to the Foundation and then transferred to the Institution according to the spending policy for the permanent endowment and the terms of the gift. All of the gifts to the Chautauqua Fund are transferred to the Institution. Annual gifts to the Chautauqua Fund are used in the operating budget of the Institution to support the full range of programming Chautauqua offers. While the Foundation’s reporting is based on its fiscal year ended March 31, the Chautauqua Fund operates on a calendar year. During the 2013 calendar year, the Fund raised $3,600,669. 86% of this amount was from the Bestor Society and 1874 Society members. The success of the Fund depends upon nearly 140 volunteers who solicit gifts from Chautauquans, patrons, and community residents. The costs of the fundraising efforts performed by the Foundation on behalf of the Institution are reported in the Foundation’s audited financial statements. The five year average of such costs was 7.7% of the amount raised for the fiscal year ended March 31, 2014.

<table>
<thead>
<tr>
<th>Fiscal</th>
<th>Chautauqua Fund</th>
<th>Endowment</th>
<th>Capital &amp; Other</th>
<th>Total</th>
<th>Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$3,563,728</td>
<td>$7,816,690</td>
<td>$14,356,124</td>
<td>$25,736,542</td>
<td>2,952</td>
</tr>
<tr>
<td>2013</td>
<td>3,514,364</td>
<td>12,054,029</td>
<td>2,469,254</td>
<td>18,037,647</td>
<td>3,185</td>
</tr>
<tr>
<td>2012</td>
<td>3,566,002</td>
<td>4,702,872</td>
<td>2,241,781</td>
<td>10,510,654</td>
<td>3,351</td>
</tr>
<tr>
<td>2011</td>
<td>3,275,022</td>
<td>4,768,036</td>
<td>2,997,530</td>
<td>11,040,588</td>
<td>3,273</td>
</tr>
<tr>
<td>2010</td>
<td>3,111,734</td>
<td>2,582,582</td>
<td>3,139,224</td>
<td>8,833,540</td>
<td>3,353</td>
</tr>
</tbody>
</table>

The charts above represent total philanthropic activity, which includes new cash gifts, new planned gifts, and pledges recorded during the most recent five fiscal years (in thousands).
Endowment Contributions Receivable

New pledges and planned gift intentions, when combined with the previously stated intentions of donors, create a pool of future assets in excess of $47.2 million as of March 31, 2014. These assets grew by $5.2 million during the fiscal year. The discounted value of unconditional contributions receivable recorded in the financial statements was $8.3 million as of March 31, 2014. Conditional contributions receivable are not recorded until such time as the conditions are substantially met. The Eleanor B. Daugherty Society recognizes donors during their lifetime who have chosen to support Chautauqua’s mission through a planned gift. Members are listed on pages 42 and 43.

March 31, 2014

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

Unconditional contributions receivable as of March 31, 2014

<table>
<thead>
<tr>
<th></th>
<th>Gross</th>
<th>Discount</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pooled Life Income Fund</td>
<td>$3,687,124</td>
<td>$2,008,791</td>
<td>$1,678,333</td>
</tr>
<tr>
<td>Irrevocable Trusts</td>
<td>6,512,283</td>
<td>4,461,050</td>
<td>2,051,233</td>
</tr>
<tr>
<td>Cash Pledges</td>
<td>1,994,258</td>
<td>242,435</td>
<td>1,751,823</td>
</tr>
<tr>
<td>Estates in Probate</td>
<td>2,398,076</td>
<td>-0-</td>
<td>2,398,076</td>
</tr>
<tr>
<td>Retained Life Estates</td>
<td>580,000</td>
<td>134,610</td>
<td>445,390</td>
</tr>
<tr>
<td></td>
<td>$15,171,741</td>
<td>$6,846,886</td>
<td>$8,324,855</td>
</tr>
</tbody>
</table>

Conditional contributions receivable as of March 31, 2014

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Bequests</td>
<td>$16,809,147</td>
</tr>
<tr>
<td>Retirement Plans</td>
<td>8,920,818</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>434,939</td>
</tr>
<tr>
<td>Revocable Trusts</td>
<td>5,875,718</td>
</tr>
<tr>
<td></td>
<td>$32,040,622</td>
</tr>
</tbody>
</table>
Endowment Net Assets

The Foundation’s net assets were $83.5 million at the close of the fiscal year ended March 31, 2014, $8.2 million higher than reported at the beginning of the fiscal year. There were 676 active endowment funds as of March 31, 2014, representing $74.9 million of net assets. The vast majority of these funds are permanent endowments created to provide financial support for a specified purpose or to provide general support to the Institution. The remaining funds are funds whose principal may be expended but that the Foundation invests as part of the permanent endowment portfolio.

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

Support to the Institution

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

The Investment Committee regularly reviews investment policies, strategy, execution, and performance. Because asset allocation is the primary driver of a portfolio’s total return over the long run, comparison of performance is viewed in the context of the portfolio’s asset class holdings. The Committee’s oversight responsibilities cover $80.8 million in invested assets, comprised of the following portfolios:

1) **Endowment** ($75.1 million)
2) **Temporarily restricted** ($1.2 million)
3) **Pooled life income fund** ($3.7 million)
4) **Custodial** ($3.8 million)

Each portfolio is managed according to its specific objectives, and has a unique asset allocation appropriate to those objectives. Investment performance is presented on a net basis, defined as total time weighted return after all investment management fees.

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

1) Individual endowment funds are pooled for investment purposes and tracked with unit accounting. This pooled approach enables endowment funds to collectively benefit from the diversification and efficiencies that are available to larger investors. Each endowment fund receives its proportionate share of return based on the market value of the endowment as a percentage of the total market value of the investment portfolio. Hirtle, Callaghan & Co., LLC manages $60.7 million of the endowment and $14.4 million of the endowment is invested in the two funds of hedge funds. The endowment’s net return for fiscal year 2014 was 10.9%.

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

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

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

**Endowment Investment Portfolio**

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

Total endowment market value as of March 31, 2014 and 2013 was $75.1 and $66.9 million, respectively. As of March 31, 2014 the portfolio was allocated as shown in the accompanying table.

Annual Fiscal Year Performance

The investment committee takes a long term approach, over full market cycles, to assess the performance of the portfolio. The Foundation has produced excellent long-term investment returns. Over the ten-year period ending March 31, 2014, the Endowment earned an annualized 6.2% return, net of fees, surpassing the annual results of the diversified benchmark, 6.0%. This benchmark is net of fees and is diversified based on the strategic allocation of the Russell 3000, MSCI EAFE, HFR Strategic and BarCap Aggregate Bond indices. The benchmark is currently weighted 30% Russell 3000, 30% MSCI EAFE, 20% HFR Strategic and 20% BarCap Aggregate Bond.
$83,493,415
The Foundation’s net assets as of March 31, 2014

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

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

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

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

43%
Fiscal 2014 increase in total philanthropy over the previous year
The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of March 31, 2014 and 2013, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

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

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

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

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

Opinion
In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Foundation as of March 31, 2014 and 2013 and the changes in its net assets and cash flows for the years then ended, in conformity with accounting principles generally accepted in the United States of America.

June 16, 2014
### STATEMENTS OF FINANCIAL POSITION

**March 31, 2014**

**Assets:**

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

**Liabilities and Net Assets:**

**Liabilities:**

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

**Net Assets (Note 7):**

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

**Total liabilities and net assets**

| Total liabilities and net assets                        | **$ 86,574,495** | **$ 78,216,694** |

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

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

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

<table>
<thead>
<tr>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues and gains:</strong></td>
<td></td>
<td></td>
<td></td>
</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>$3,514,364</td>
<td>$3,514,364</td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td>157,268</td>
<td>7,491,786</td>
<td>7,649,054</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>22,334</td>
<td>1,231,857</td>
<td>1,254,191</td>
</tr>
<tr>
<td>Total contributions</td>
<td>-</td>
<td>3,693,966</td>
<td>8,723,643</td>
</tr>
<tr>
<td>Interest and dividends (Note 3)</td>
<td>-</td>
<td>1,027,134</td>
<td>1,027,134</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>-</td>
<td>4,431,710</td>
<td>4,431,710</td>
</tr>
<tr>
<td>Total revenues and gains</td>
<td>9,152,810</td>
<td>8,723,643</td>
<td>17,876,453</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General and administrative</td>
<td>624,718</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Support to the Institution:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>3,514,364</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Program (Note 5)</td>
<td>1,603,719</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Development (Note 6)</td>
<td>773,310</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total expenses</td>
<td>6,516,111</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>6,954,389</td>
<td>(6,954,389)</td>
<td>-</td>
</tr>
<tr>
<td>Change in net assets</td>
<td>438,278</td>
<td>2,198,421</td>
<td>8,723,643</td>
</tr>
<tr>
<td>Net assets - beginning</td>
<td>(1,244,674)</td>
<td>9,685,699</td>
<td>55,468,037</td>
</tr>
<tr>
<td>Net assets - ending</td>
<td>$ (806,396)</td>
<td>$11,884,120</td>
<td>$64,191,680</td>
</tr>
</tbody>
</table>

See accompanying notes.
For the years ended March 31,  

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

Investing activities:  

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

See accompanying notes.
1. Summary of Significant Accounting Policies:

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

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

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

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

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

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

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

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

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

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

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

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

Promises to Give:
Unconditional promises to give that are expected to be collected in future years are recorded at the present value of estimated future cash flows. The discounts on those amounts are computed using an interest rate applicable to the year in which the promise is received. Amortization of the discount is included in contributions revenue in the statements of activities. Conditional promises to give to the Foundation or the Institution are not recorded as revenue until such time as the conditions are substantially met, and totaled $32,041,000 and $26,463,000 at March 31, 2014 and 2013.

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

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

Subsequent Events:
The Foundation has evaluated events and transactions for potential recognition or disclosure through June 16, 2014, the date the financial statements were available to be issued.
Reclassifications:
The 2013 financial statements have been reclassified to conform with the presentation adopted for 2014.

2. Contributions Receivable:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$2,286,921</td>
<td>$3,932,186</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>12,884,820</td>
<td>11,644,222</td>
</tr>
<tr>
<td>Less discount</td>
<td>15,171,741</td>
<td>15,576,408</td>
</tr>
<tr>
<td></td>
<td>6,846,886</td>
<td>7,535,870</td>
</tr>
<tr>
<td></td>
<td>$8,324,855</td>
<td>$8,040,538</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>$3,259,046</td>
</tr>
<tr>
<td>One through five years</td>
<td>1,124,188</td>
</tr>
<tr>
<td>Greater than five years</td>
<td>10,788,507</td>
</tr>
<tr>
<td></td>
<td>$15,171,741</td>
</tr>
</tbody>
</table>

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

3. Investments:

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

The 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>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redeemable at calendar year end with 75 to 95 days notice</td>
<td>$14,371,759</td>
<td>$12,992,466</td>
</tr>
<tr>
<td>Illiquid with return of capital allowed at varying dates during the period 2016 through 2025</td>
<td>5,731,623</td>
<td>5,074,769</td>
</tr>
<tr>
<td></td>
<td>$20,103,382</td>
<td>$18,067,235</td>
</tr>
</tbody>
</table>

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

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

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

4. Property and equipment:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td>$12,500</td>
<td>$12,500</td>
</tr>
<tr>
<td>Building</td>
<td>152,275</td>
<td>152,275</td>
</tr>
<tr>
<td>Office equipment and furnishings</td>
<td>150,637</td>
<td>148,894</td>
</tr>
<tr>
<td></td>
<td>315,412</td>
<td>313,669</td>
</tr>
<tr>
<td>Less accumulated depreciation</td>
<td>265,497</td>
<td>253,979</td>
</tr>
<tr>
<td></td>
<td>$49,915</td>
<td>$59,690</td>
</tr>
</tbody>
</table>

5. Distributions to the Institution:
Amounts payable for program support at March 31:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income and principal</td>
<td>$1,736,849</td>
<td>$1,603,719</td>
</tr>
<tr>
<td>Income from prior periods</td>
<td>327,946</td>
<td>353,704</td>
</tr>
<tr>
<td></td>
<td>$2,064,795</td>
<td>$1,957,423</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income from permanently restricted endowments</td>
<td>$1,679,775</td>
<td>$1,476,843</td>
</tr>
<tr>
<td>Income and principal from temporarily restricted gifts and other funds</td>
<td>143,000</td>
<td>126,876</td>
</tr>
<tr>
<td></td>
<td>$1,822,775</td>
<td>$1,603,719</td>
</tr>
</tbody>
</table>
6. Other Transactions with the Institution:
Pursuant to an agreement between the Foundation and the Institution, the Foundation reimburses the Institution regularly for various personnel and administrative expenses. Additionally, the Foundation was reimbursed $350,000 in 2014 and 2013 by the Institution for development services the Foundation provided to the Institution. These amounts are included as a reduction of 2014 and 2013 development expenses in the accompanying statements of activities.

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

7. Net Assets:
At March 31, 2014 and 2013, the market value of certain endowment funds was $149,276 and $806,396 lower than the original gifted values due to investment experience. These amounts are reflected in the statements of financial position as negative unrestricted net assets.

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

<table>
<thead>
<tr>
<th>Purpose</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$ 7,676,530</td>
<td>$ 5,157,575</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>$ 3,501,940</td>
<td>$ 2,120,098</td>
</tr>
<tr>
<td>Temporarily restricted gifts</td>
<td>$ 5,182,032</td>
<td>$ 4,606,447</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 16,360,502</strong></td>
<td><strong>$ 11,884,120</strong></td>
</tr>
</tbody>
</table>

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

Any remaining portion of donor restricted endowment funds not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Foundation in a manner consistent with the standard of prudence prescribed by NYPMIFA. In accordance with NYPMIFA, the Foundation considers the following factors to appropriate or accumulate donor restricted endowment funds:

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

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

<table>
<thead>
<tr>
<th>Category</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$40,461,782</td>
<td>$39,815,669</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>26,820,407</td>
<td>24,376,011</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$67,282,189</strong></td>
<td><strong>$64,191,680</strong></td>
</tr>
</tbody>
</table>

8. Retirement Plan:
The Foundation participates in a 403(b) retirement plan for substantially all employees, subject to plan conditions. The Foundation contributes 10% of the employee’s gross pay each year. Funded contributions and costs totaled $70,000 and $72,000 for the years ended March 31, 2014 and 2013.

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

<table>
<thead>
<tr>
<th>General and administrative:</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment management</td>
<td>$375,891</td>
<td>$315,843</td>
</tr>
<tr>
<td>Salaries and benefits</td>
<td>231,103</td>
<td>230,511</td>
</tr>
<tr>
<td>Office</td>
<td>8,001</td>
<td>10,263</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>25,975</td>
<td>23,505</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>32,389</td>
<td>27,626</td>
</tr>
<tr>
<td>Equipment maintenance and repairs</td>
<td>20,981</td>
<td>14,981</td>
</tr>
<tr>
<td>Education</td>
<td>1,434</td>
<td>1,989</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td><strong>$695,774</strong></td>
<td><strong>$624,718</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support to the Institution:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Chautauqua Fund</td>
<td>$3,563,728</td>
<td>$3,514,364</td>
</tr>
<tr>
<td>Program:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building, structures and grounds</td>
<td>$247,877</td>
<td>$184,665</td>
</tr>
<tr>
<td>General operations</td>
<td>212,523</td>
<td>366,136</td>
</tr>
<tr>
<td>Lectureship and CLSC</td>
<td>507,379</td>
<td>373,005</td>
</tr>
<tr>
<td>Performing arts</td>
<td>478,971</td>
<td>372,555</td>
</tr>
<tr>
<td>Religion</td>
<td>151,043</td>
<td>127,925</td>
</tr>
<tr>
<td>Scholarship and youth</td>
<td>224,982</td>
<td>179,433</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td><strong>$1,822,775</strong></td>
<td><strong>$1,603,719</strong></td>
</tr>
</tbody>
</table>

Development:

| Salaries and benefits                           | $855,886 | $828,969 |
| Promotion and communications                   | 103,715  | 51,222  |
| Office                                          | 42,488   | 79,410  |
| Travel and hospitality                          | 127,083  | 114,163 |
| Professional and consulting                     | 39,033   | 23,609  |
| Equipment maintenance and repairs               | 21,379   | 19,502  |
| Education                                       | 5,587    | 6,435   |
| Reimbursement by the Institution                | (350,000)| (350,000)|
| **Total expenses**                              | **$845,171** | **$773,310** |

The Board of Directors
Chautauqua Foundation, Inc.

We have audited the financial statements of Chautauqua Foundation, Inc. as of and for the years ended March 31, 2014 and 2013 and have issued our report thereon dated June 16, 2014 which expressed an unmodified opinion on those financial statements. Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The schedules of expenses for the years ended March 31, 2014 and 2013 are presented for the purposes of additional analysis and are not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audits of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

June 16, 2014

INDEPENDENT AUDITORS’ REPORT ON ADDITIONAL INFORMATION
ENDOWMENT FUNDS

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

* Income and principal may be distributed

New funds are designated in orange.

Paul M. Alexander Fund *
Dorothy L. Anderson Endowment for Chautauqua
Mary Apple Fund *
Robert and Je'Anne Bargar Endowment
Zoe and Ken Barley Endowment
Beatrice B. Bates Fund
Julia M. Bates Fund
Nancy and Dick Bechtolt Fund
Thomas and Jane Becker Endowment
Bemus Fund for Chautauqua
Gordon Benn Fund
Alan J. and Mary Hough Blair Fund
Cora M. Blair Fund
The Erika Block Fund for Chautauqua *
Martha Borowsky Endowment Fund
Bosland Family Fund
Boyle Family Fund
Barbara A. and Patrick James Brady III Endowment for Chautauqua
Sarah E. Bradley Endowment for Chautauqua
Barbara and William Branch Fund
Daniel and Wanita Bratton Endowment
Lillian Brink Endowment Fund
Gary M. and Willow R. Brost Endowment for Chautauqua
Henrietta T. Campbell Fund
Maxine M. Carleton Fund
Katharine J. Carnahan Endowment
Barbara P. and Howard E. Chadwick Fund
Genevieve Chaney Fund
Julia and William Clinger Fund
Marion and Eugene Cohen Fund
Ruth K. Collyer Endowment
Jack and Marcia Connolly Fund for Chautauqua
The Mildred K. Cooper Fund for Chautauqua *
Helen and George L. Cornell Fund
Katharine and Robert W. Cornell Fund
Sarah A. Corns Fund
Martha S.H. Cowles Fund
Helen T. and Ralph E. Crockett Endowment
Laura and Brad Currie Endowment for Chautauqua
Elizabeth Danielson Fund
Dietrich Family Endowment at Chautauqua
Martha T. and Morgan O. Doolittle Fund
Lora Lee and Bob Duncan Endowment
Ann O. Edison Endowment *
Albert C. Elser II Fund
Cordelia C. Ensign Fund
Helen C. Estabrook Fund
Agnes H. and Hal A. Fausbaugh Fund
Fetterolf Family Fund
George L. Follansbee, Jr. and Gay E. Didget Endowment for Chautauqua
Gelb Family Endowment for Chautauqua
William R. and Betsy Callicott Goodell Endowment
Kathleen M. and Donald C. Greenehouse Endowment for Chautauqua
Groninger Family Fund
Habenicht Family Fund
Felicia Grace Hall Fund
Tirzah H. Hall Fund
Sarah R. Hankey Fund for Chautauqua *
Diana and Samuel Harbison Endowment
Heber R. Harper Fund
Lisa Heinz Endowment for Chautauqua
Dorothy S. and William F. Hill, II Endowment for Chautauqua
Holden Family Fund
Charles R. Hunter, Jr. Fund
Esther M. Huntoon Fund
Verna Jackson Memorial Endowment for Chautauqua
James Family Fund
Katherine King Karslake Fund
Ronald L. and Rosie C. Kilpatrick Endowment
Georgiana Bole King Endowment
The Lawrence G. Knecht Fund
Knox Family Endowment
Konneker Fund
Mary E. Kuhns Fund
Velma Jean Laird Endowment
Oliver M. Langenberg Fund
Robert and Susan Laubach Endowment
LeClere Family Endowment
Elizabeth S. & Reginald A. Lenna Fund
Stella C. Logan Fund
William Charles Lortz Endowment
Sara M. and Robert S. Lucas Fund
Stan and Sara Lundine Fund
Lyndall Family Fund
Ann and Charles H. Lytle Endowment
Jeannette B. Mainwood Fund
Gerald and Dorothea Maloney Endowment
Clara Masik Endowment
Mary E. McCann Fund *
Mary Jane and Donald McClurg Endowment
Margaret C. Mercer Endowment
Richard H. Miller Fund
Dawson E. Charlotte B. Molyneaux Endowment
Jane C. Morgan Fund
Lewis W. & Katherine C. Morgan Fund
James R. Morris III Fund
The George E. and Susan Moran Murphy Family Fund
Robert B. and June A. Osburn Fund
Robert Pace Endowment Fund
Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
William H. and Mary C. Park Fund
Mary Lou Cady Parlato Endowment for Chautauqua
Dorothy Payne Endowment Fund
Charles E. and Gladys W. Peirce Fund
Margaret Penn Fund
Sheila Penrose and Ernest Mahaffey Endowment for Chautauqua
Steven W. and Barbara P. Percy Endowment for Chautauqua
Helen Pickup-Hyman Fund
Mary Ellen Pindyck Fund
Sam and Petey Tinkham Price Family Fund
Mary Oram Reading Fund
Agnes H. Reigart Fund
Elaine Y. Rieser Endowment for Chautauqua
William Rittman Fund
Mary Ritts Endowment
Walter Roberts Fund
Doris H. Ruslink Fund *
Harper G. and Blanche Billings Rusterholtz Fund
Herbert B. Sachse Fund *
Newton B. Schott, Jr. and Antoinette L. LeQuire-Schott Endowment
Barbara and John Schubert Endowment Fund
Dr. O. Peter Schumacher Fund
Emma O. and H. Parker Sharp Fund
Jane R. and Walter C. Shaw, Jr. Fund
Ralph C. Sheldon, Jr. Fund
Dorothy E. Shepherd Fund *
Bert W. and Joanne R. Simons Endowment
George T. and Margaret D. Snyder Endowment for Chautauqua
Nancy Coburn Snyder Endowment Fund
Thomas H. and Joan Stevens Family Endowment for Chautauqua
Betty P. and J. Bruce Stromgren Fund *

The Robert C. and Patricia D. Switzer Family Fund
Tate Family Fund
Eleanor M. Thomas Fund
The Susan and John Turben Foundation Endowment for Chautauqua
Joseph & Elizabeth Verlie Endowment
Carl A. and Mary Louise Viehe Family Endowment
Nina and Norman Wain Family Endowment for Chautauqua
Evelyn Wargo Endowment
Nina T. Wensley Fund
Helen N. White Fund
Robert O. Wilder Family Fund
The Mary S. Wilsdon Fund for Chautauqua *
Henry L. Wood Fund
John B. Yoder Endowment for Chautauqua
Robert and Virginia Young
The Deborah and Allen Zaretsky Fund
Stephen J. Zenczak and Patricia E. Feighan Endowment for Chautauqua
General Endowment Fund
SPECIFIED FUNDS
$49,009,238 Assets
$1,612,312 Current Year Distribution

New funds are designated in orange.

PHYSICAL MAINTENANCE FUNDS
$7,857,825 Assets
$247,876 Current Year Distribution

Buildings and Structures
$6,441,153 Assets
$203,704 Current Year Distribution

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

AMPHITHEATER ENDOWMENT

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

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

Specific Gardens and Parks  
$916,033 Assets  
$32,431 Current Year Distribution  
The Reid B. Babcox Memorial Garden Terrace Endowment  
The Bell/Ritts Garden Fund  
The Bishop’s Garden Fund  
Selina W. Braham Memorial Garden Fund  
Judge W. Walter Braham Garden Fund  
Dr. Daniel and Wanita Bratton Garden Fund  
The Henrietta T. Campbell Garden Fund  
The Carothers Family Garden Fund  
The Kirk David Casto Memorial Garden Fund  
Jean Chadwick Memorial Garden Fund  
The CLSC Class of 1982 Helen W. Giacobine Garden Fund  
The Connolly Family Gardens and Fountains Endowment  
The Cornell Garden Fund  
DeeDee’s Garden Endowment  
The Ehrenreich Family Fund  
The Fausnaugh Family Garden Fund  
Peggy Foley Memorial Garden Fund  
The Jean Rice Goodell Garden Fund  
The Robert Y. Gromet Family Garden Fund  
The Mary Kimball Haker Memorial Garden Endowment Fund  
The Eleanor McKnight Haupt Fund  
The Holden Garden Fund  
Patricia K. Ives Memorial Beautification Fund  
Henrietta Ord Jones Memorial Fund  
The JoAnn Jubell Memorial Fund  
The Judson Park Fund  
Joan Lincoln Garden Fund  
The Wilfred B. McCune Memorial Garden Fund  
Mary Louise Molyneaux Garden Fund  
Penneys Garden Endowment  
Ride/Savage Memorial Garden Fund  
The Michael M. Ross Garden Fund  
The Mme. Shao Fang Sheng Garden Fund  
Toni Sterman Memorial Garden  
The Stephen Toms Garden Fund  
The Dr. Alan Winkelstein Garden Fund  
The Roy and Dorothy Wissel Garden Fund  
The Frank Lloyd Wright Garden Fund  
The Frank Lloyd Wright School of Architecture and Taliesin Fellowship Garden Fund  

General Grounds And Gardens  
$500,639 Assets  
$11,741 Current Year Distribution  
D.A.R. Flag Fund  
Garden Beautification Fund  
Louise Marshall Lincoln Memorial Garden Fund  
The Constance Lincoln Newbury Memorial Garden Fund  
The Walter C. Shaw, Jr. Family Tree Fund  
Tree Fund  

EDUCATION & YOUTH FUNDS  
$10,832,257 Assets  
$337,109 Current Year Distribution  

Lectureships  
$8,342,329 Assets  
$259,953 Current Year Distribution  
10:45 Lecture Platform Endowment  
Malcolm Anderson Lecture Fund  
The Sondra R. and R. Quintus Anderson Lectureship  
Helen S. and Merrill L. Bank Lectureship  
David and Wendy Barenfeld Lectureship Fund  
The Crawford N. and May Sellstrom Bargar Lectureship in Business and Economics  
Robert S. Bargar Memorial Lectureship  
The Arnold and Jill Bellowe Lectureship  
Berglund-Weiss Lectureship Fund  
June and Albert Bonyor Lectureship Fund  
Dr. Edwin Prince Booth Memorial Lectureship Fund  
The Boyle Family Lectureship Fund  
Selina and Walter Braham Lectureship  
The Richard Newman Campen “Chautauqua Impressions” Fund  
The Carnahan-Jackson Lectureship  
The Chautauqua Fellows Fund  
William and Julia Clinger Lectureship  
Beverly and Bruce Conner Endowment for Education  
The Joseph H. Defrees Memorial Lecture  
The Edith B. and Arthur E. Earley Lectureship  
The FogleSong Family Lectureship Fund  
The Chip and Gail Gamble Lecture Endowment
**SUSTAINABLE**

**ENDOWMENT FUNDS (CONT.)**

**CONNOLLY FAMILY ENDOWMENTS**

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

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

**Literary Arts**

$1,392,006 Assets  
$46,134 Current Year Distribution  

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

Youth Activities
$570,420 Assets
$18,120 Current Year Distribution
Ward T. Bower Youth Activities Memorial
Elizabeth Elser Doolittle Fund for Youth
The Gelb Family Endowment Fund
Gelb Family Fund
Cyril T. M. Hough and Lt. C. Randall Hough, USMC Memorial Fund
The Katie Howard Memorial Fund
Paul L. Sample Memorial Fund
Andrew and Donna Sorensen Youth Activities Center Endowment
The Laurence and Maria Wagner Family Fund
Youth Activities Fund

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

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

General
$2,775,631 Assets
$99,404 Current Year Distribution
The John T. and Katherine G. Bailey Family Fund
The Boyle Family Fund for the Performing Arts
Emily and John Corry Endowment for the Performing Arts
The Barbara Baldwin DeFrees Fund for the Performing Arts
The Edith B. and Arthur E. Earley Fund for the Performing Arts
The Endowment Fund for the Performing Arts
The Lenna Fund for the Performing Arts
The Helen Cooper Mercer Fund for Performing Arts
National Endowment for the Arts Fund
The Rittman Family Fund for Performing Arts
The Julia and Ralph C. Sheldon, Jr. Fund for the Performing Arts

Opera
$4,206,910 Assets
$123,232 Current Year Distribution
A. Chace & Josephine B. Anderson Opera Endowment Fund
John E. Anderson Opera Endowment
The Peggy and Andy Anderson Family Fund for Opera
The Cynthia Auerbach Fund for Opera
Bemus Endowment for Opera
Anne and John Burden Opera Fund
Chautauqua Opera Endowment Fund
The Chautauqua Opera Guild Endowment
Thomas and Kathleen Clingan Fund for Opera
The Connolly Family Fund For Opera
The John A. and Emily McKnight Corry Opera Fund
The Barbara Baldwin DeFrees Opera Fund
The Walter F. Ferchen Opera Fund
The Eleanor B. Franks Fund for the Opera
The James and Elisabeth Groninger Fund for Opera
The Jane A. Gross Opera Endowment
The Kay Frantz Israel Fund for Opera
The Mildred Lesenger Fund for Opera
The Kay H. Logan Opera Fund
The Annette Pickens Malvin Memorial Fund for Opera
The Christopher and Susan Martin Opera Fund
The Margaret Clark Mercer Fund for Opera
The Ralph E. Miller and Paul E. Cawein Fund for Opera
The Steve Z. and Mary G. Mitchell Family Fund
The Reverend Lloyd V. Moffett Opera Endowment Fund
The Robert G. and Lillian Vitanza Ney Family Opera Fund
The Joseph A. and Anne T. Prezio Opera Endowment Fund
The Richards Family Opera Fund
The Molly Rinehart Fund for Opera
The Wadsworth Fund
Charles and Lois Weaver Fund for Opera
Dr. Fred R. Whaley and Helen A. Whaley Fund for Opera
The Robert and Virginia Young Opera Fund
Zemsky Endowment For Opera

Symphony
$3,802,205 Assets
$142,594 Current Year Distribution
Clement and Karen Arrison Endowment for Classical Violin
Maggie Bella Symphony Orchestra Endowment Fund
The Boyle Family Fund for the Chautauqua Symphony Orchestra
The Mary Peterson Chalfant Fund for the Chautauqua Symphony Orchestra
Chautauqua Symphony Orchestra Endowment Fund
The Carl and Lee Chaverin Fund
William D. Kuhns Fund for General Music Purposes of Chautauqua Institution
The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra
Chautauqua Symphony Orchestra Endowment Fund
Helen T. Logan Fund for the Chautauqua Symphony Orchestra
Mr. & Mrs. Sam A. Miller and Mr. & Mrs. Edward S. Babcock Memorial Fund
### Chautauqua Clergy Leadership Program

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

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

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

### Theater

- **$486,313 Assets**
- **$12,612 Current Year Distribution**

- The Arnold and Jill Bellowe Fund for Theater
- The Nancy E. Brewer Fund for Theater
- Chautauqua Theater Fund
- The Crockett Family Fund for Theater
- The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming
- The Joel and Barbara Jacob and M. Jacob and Sons Fund for Theater
- Helen Moe Fund for Theater
- The Florence and Cynthia Norton Fund for Theater
- The Phoebe Wagner Ott Theater Fund

### Dance

- **$1,149,011 Assets**
- **$40,120 Current Year Distribution**

- The Paul and Toni Branch Fund for Dance
- Carnahan-Jackson Dance Chair Endowment
- The Carnahan-Jackson Dance Endowment
- Moore Fund for Dance

### Visual Arts

- **$1,734,620 Assets**
- **$61,009 Current Year Distribution**

- 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
- VACI Gallery Director Endowment
REligion Funds
$4,645,104 Assets
$151,044 Current Year Distribution

General
$1,387,656 Assets
$49,169 Current Year Distribution
Campbell Department of Religion Fund
Eleanor B. Daugherty Fund
Department of Religion Fund
Department of Religion Leadership Fund
Carrell Leiper Hall Memorial Fund in Honor of Dr. Henry Smith Leiper
Lois Raynow Department of Religion Fund
The Waasdorp Fund for Religious Initiatives

Chaplaincies
$874,633 Assets
$31,784 Current Year Distribution
Marie Reid-Edward Spencer Babcox Memorial Fund
Robert D. Campbell Memorial Chaplaincy
Daney-Holden Chaplaincy Fund
The Mr. and Mrs. William Uhler Follansbee Memorial Chaplaincy
J. Everett Hall Memorial Chaplaincy
Samuel M. and Mary E. Hazlett Memorial Fund
Jackson-Carnahan Memorial Chaplaincy
Alison and Craig Marthinsen Endowment for the Department of Religion
The Geraldine M. and Frank E. McElree, Jr. Chaplaincy Fund
Randell-Hall Memorial Chaplaincy
Harold F. Reed, Sr. Chaplaincy
Edmond E. Robb-Walter C. Shaw Fund
John William Tyrrell Endowment for Religion

Lectureships
$1,257,016 Assets
$38,586 Current Year Distribution
Carnahan-Jackson Religious Lectureship
The Jack and Elizabeth Gellman and 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
$1,125,799 Assets
$31,505 Current Year Distribution
Alice A. Allen Fund
John E. Anderson Religion Endowment
The Reverend Noel A. Calhoun, Jr., D.D. Fund
Campbell Department of Religion Audio-Visual Fund
Joan Brown Campbell Department of Religion Endowment
The Chautauqua Fund for Sacred Music
The Myra Baker Low and Katharine Low Hembree Family Fund
S. R. and Jennie Hamill McClure Family Fund
The William H. and Mary C. Park Religious Programming Fund
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
$6,242,881 Assets
$208,930 Current Year Distribution

A. Chace Anderson Fine and Performing Arts Scholarship
Peggy and Andy Anderson Family Scholarship Fund
Richard W. Antemann Memorial Scholarship
Barakat Scholarship
The Michael L. Barnett Scholarship Fund
Bell Tower Scholarship Fund
The Jill W. Bellowe Chautauqua Conservatory Theater Scholarship
The Chuck Berginc Scholarship
Dr. and Mrs. Arthur E. Bestor Scholarship Fund
The Frances Black Scholarship Fund
The Margaret B. Blossom Scholarship
Bonnefoix/McBride Dance Scholarship
June and Albert Bonyor Scholarship Fund for Ballet
Alexander W. Bouchal Memorial Scholarship
Ward T. Bower Memorial Scholarship
Frederick Percival Boynton Scholarship
JoAnn and Gene Buffo Voice Scholarship
Lowell and Frances Hyam Brentano Fund
The Anne C. Britton Memorial Scholarship
The Charles and Ethel Brody Theater Scholarship
The Gladys Brooks Scholarship Endowment Fund
The Indiana-Peggy Hoover Bryan Voice Scholarship
Shirley Budke Memorial Fund for Blind Students
The Edwin L. Bullock Scholarship
The Lillian B. Bullock Scholarship
Burden-Staples Music Scholarship
Bennett and Mary Jo Burgoon Memorial Scholarship
The Andrew L. and Gayle Shaw Camden Fund for Theater Arts
The Carnahan-Jackson Scholarship Fund
The Chautauqua Art Scholarship
The Chautauqua Golf Club Scholarship Fund
The Chautauqua Theater Scholarship
The Chautauqua Voice Scholarship
Clark Scholarship Fund
Joseph Clarke Scholarship Fund
Clarkson Family Scholarship
The Theodore R. Colborn Scholarship
The William Cole/King Scholarship
Beverly and Bruce Conner Scholarship Fund
James and Barbara Copeland Scholarship Fund
The Bettsy and Ellis Cowling Scholarship for Music
The Daley Family Fund
Eleanor B. Daugherty Scholarship Fund
Diamond Jubilee Class of 1948 Scholarship

FUND FOR THE EXPLORATION OF WORLD RELIGIONS AND SPIRITUAL PRACTICES

Subagh Singh Khalsa and Subagh Kaur Winkelstern established the Fund for the Exploration of World Religions of Spiritual Practices to support experiential programs and spiritual practices of various kinds, as taught within the world’s religious traditions. Khalsa is the founder of the Mystic Heart Program, a Department of Religion initiative aimed at teaching Chautauquans meditation techniques from various world faiths and traditions. The fund will leave room for the Mystic Heart Program to evolve and grow and allow for additional programs to be created in the future. The purpose of the fund reflects the goals and values of the Subaghs. They hope that by creating the fund a seed has been planted and that others involved in spiritual practice will help it to sprout.
Mary Lowe Dickinson Scholarship
Dietrich Family Endowment for Music at Chautauqua
The Mardelle Dressler Dobbins Scholarship
The Rachel W. Eaton Scholarship
The Bina Edkin Eckerd Memorial Fund for the Fine and Performing Arts
The Robert Hunt and Mary Campbell Eckhardt Memorial Scholarship
David and Miriam Yanes Eddleman Voice Scholarship
The Miriam Yanes Eddleman Dance Scholarship
The Michael and Jane Eisner Scholarship Fund
Mary Cummings Paine Eudy Scholarship
The Falk Scholarship Fund
The Agnes H. and Hal A. Fausnaugh Chautauqua Conservatory Theater Scholarship
Beverly and Marvin Fiegelman Scholarship Fund for the Performing Arts
Genevieve Foote Findley Scholarship
Ted and Deborah First Scholarship
Edith Reid Flaster Memorial Dance Scholarship
The Luella Morris Forney Memorial Scholarship
Wilbur D. Forney Memorial Scholarship Fund
Dr. Stephen Fudell Memorial Scholarship Endowment
The Harriet B. and Ralph T. Geller Memorial Scholarship
Marjorie Geller Memorial Dance Scholarship
The Elizabeth & Jack Gellman and Deborah & Allen Zaretsky Scholarship Fund
General Scholarship Fund
The Howard G. Gibbs Scholarship Fund
Sheila Gitlitz Scholarship Endowment
The Gitlitz Scholarship Fund for Visual Arts
Glendorn Foundation Scholarship Fund
Golay-Bradford Endowment for Families
The Rosalyn Goldberg Scholarship Fund
The Toni and Joseph Goldfarb Scholarship Fund for Fine & Performing Arts
The Alfred E. Goldman Scholarship
The Jessie D. Grassie Class of 1882 Scholarship
Franklin P. & Fern Green and William P. & Ruth Bates Art Scholarship
The Groff-Simpson Family Scholarship
Grover Family Scholarship Fund
G. Thomas & Kathleen Harrick Music Scholarship
Harris Scholarship for Performing Arts
Ruth Higby Haver and Della and David Higby Music Scholarship
Lillian B. Hersh Music Scholarship
William and Pauline Higie School of Dance Scholarship
William and Pauline Higie School of Music Scholarship
Robert D. Hiller Scholarship Fund
The Arthur and Arlene Holden Scholarship for Chautauqua
W.T. Holland Memorial Piano Scholarship Endowment
Elke Kieserling Hoppe Scholarship
Cyril T.M. Hough Memorial Scholarship Fund
Ruth M. Skinner Hutchins Scholarship Fund
Innes Family Scholarship for Studio Arts
The Dorothy M. Jackson Memorial Scholarship in Piano
The Lucinda Ely Johnson Scholarship
The Max and Edythe Kahn Scholarship Fund
The Nancy and Norman Karp Scholarship Fund
Thomas E. Kaufman Memorial Music Scholarship
The Kaylor Family Scholarship
The Danny Kayne Music Scholarship Fund
Audrey and Kenny Koblitz Scholarship
Konneker Scholarship
The John and Mary Lou Kookogey Scholarship
Felicia and Andy Landis Memorial Fund
The LaPenna-Koch Scholarship
The Marilyn G. Levinson and Nathan Gottschalk First Chair Award for MSFO Endowment
Anne R. Logan Scholarship Fund
Craig J. Luchsinger Memorial Scholarship
The Anna Mary and Richard M. Maddy Music Scholarship Fund
Marianne Elser Markham Endowment Fund
The Lucille J. McClure Memorial Music Scholarship Fund
Robert J. McKibbin Memorial Scholarship for Visual Arts
Everett and Sarah Holden McLaren Scholarship
David L. and Jane K. Miller Art Scholarship
Ralph E. Miller Memorial Scholarship for Music
The Ralph J. Miller and Florence L. Miller Memorial Scholarship in Music
The Sylvia Lucas Miller Scholarship in Music
The William E. Miller, Jr. Theater Scholarship
The Augusta L. Ebert Molyneaux Scholarship
The Elmer G. Molyneaux Scholarship
The Mary Louise Molyneaux Scholarship
Moore Scholarship Fund for Music
Jack I. and Barbara J. Morris Memorial Cello Scholarship
Gertrude T. Munger Piano Award Fund
The Abe Neches Scholarship for Dance
The Marian A. Neubauer Scholarship
Lily Lee Nixon Fund
The Fayette S. Olmstead Foundation and Pittsburgh National Bank Charitable Trust Fund
The Bernard Paul Memorial Scholarship Fund
Mary Elizabeth Peffer Music Scholarship
Rosalie H. Pembridge Dance Scholarship
Pennsylvania Scholarship Fund
Pennybacker Memorial Scholarship
Joyce and Bob Tate didn’t make Chautauqua their summer home until later in life, but when they did, they embraced almost every aspect of the Institution. They attended lectures, the symphony, and musical events, but they especially enjoyed the theater, activities of the Women’s Club, Bird Tree and Garden Club, and were also members of the Unitarian Universalist Fellowship. They enjoyed socializing with friends on the grounds and also with friends they brought to Chautauqua from Sarasota, Florida, their permanent residence.

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

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

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

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

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

Julia Gibson Axtell Memorial Fund
Braham Garden Fund
John Burden Fund
The Wendy Cohen Fund
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Mr. and Mrs. Jimmy Stevens
Sybil Willen
The Eleanor B. Daugherty Society was established to honor those individuals who have remembered Chautauqua in their estate plans through a bequest intention, a life income arrangement, a gift of real estate, as beneficiary of an IRA, or trust. The Society was named in honor of the late Eleanor B. Daugherty, a Chautauquan and retired music teacher from Buffalo, New York, who left a major bequest to Chautauqua.

New Society members are highlighted in orange.

Anonymous (14)
W. Andrew Achenbaum
Joan B. Alexander
Caroline Thompson & Steve Allen
Joanne and Henry Altland
John E. Anderson
Jack Armstrong
Sherra and Jim Babcock
James M. Bailey
Drs. Arthur and Barbara Banner
Robert and Mary Bargar
William E. and LaDonna G. Bates
Bob and Joan Battaglini
Nancy Bechtolt
Ann C. Beebe
Mary and Charles Begerow
Jill and Arnie Bellowe
Christina Bemus
Alice Benedict
Bobbi and Donald Bernstein
Caroline Van Kirk Bissell
Mary Blair
Robert and Jean Boell
June Bonyor
Mr. Edward J. Borowsky
Diana and David Bower
Loretta Bower
Ted Arnn and Mary Boyle
P. James and Barbara Brady
Kathy and James Braham
Barbara and Twig Branch
Paul S. Brentlinger
Sharon and David Britton
Margaret and William Brockman
Audre Bunis
Frederic J. and Susan Franks Buse
Mr. and Mrs. Richard J. Buxbaum
Gloria A. Caldwell
Andrew L. and Gayle Shaw Camden
Mr. and Mrs. David H. Carnahan
Susan Cartney
Dr. and Mrs. Bret A. Charipper
Christine and Ken Caro
Lee White
Jean Cheney
Carol and Jim Chimento
Molly Rinehart and Charles Christian
Geoff and Kathy Church
Marilyn and Sebastian Ciancio
Betsy Clark
Joan R. Clouse
John and Bette Cochran
Helen B. Cochrane
Wendell and Ruth Gerrard Cole
Richard and Dorothy Comfort
Jack Connolly
Ira B. Cooperman
Helen Cornell
Dr. and Mrs. R. William Cornell
John and Emily Corry
Dr. Ellis and Bettsy Cowling
Virginia H. Cox
Martin A. Coyle
John and Linda Creech
Christopher and Susan Cribbs
Joseph and Nancy Crucikshank
Barbara and John Cummings
Lindy McKnight and Erin Cunningham
Courtney Curatolo
Laura and Brad Currie
James and Karen Dakin
Dan and Carrie Dauner
Dave and Mary Davenport
David Delancey
Jennifer DeLanney
John P. DeVillars
June and Barry Dietrich
John and Virginia DiPucci
Judith and Roger Doebke
Rev. Linda L. Dominik
Lee and Barbara Dudley
Carol McCarthy Duhme
Cynthia Norton and Eagle Eagle
David and Miriam Y. Eddelman
Rivona Ehrenreich
Mr. and Mrs. Hal A. Fausnaugh
Sylvia M. Faust
Norma Ferguson
Rita Van Wie Finger
Lucille and Michael Flint
Shirley A. Flynn
George L. Follansbee, Jr.
Caryn and Henry Foltz
Charlotte and Chuck Fowler
Barbara Fox
Zetta and Ken Fradin
Joanne Fuller
Louise Farnsley Gardner
vic and Joan Gelb
Marc Geller
Barbara and Peter Georgescu
William and Nancy Gerdes
Christopher and Helena Gibbs
Lauren Rich Fine and Gary Giller
Sherry Stanley and John Giusti
Carole E. Gladstone
Clara W. Golay
Joseph and Toni L. Goldfarb
Karen and Tim Goodell
Ellen and Bob Gottfried
Dr. Cheryl O. Gorelick
Carolyn Graffam
Suzanne Gray
Don and Kathleen Greenhouse
Fred and Judy Gregory
Kent I. and Fredrika S. Groff
Elisabeth and Jim Groninger
Carl Grunfeld
Linda J. Hack
Murray and Pegi Hamner
Mr. and Mrs. James Pryor Hancock
Kathleen E. Hancock
Judith L. Hanson
Walter and Joan Harf
Terrie Hauck
Paula and Ray Hecker
William and Anne Mischakoff Heiles
George Herchenroether
Dorothy and Bill Hill
Mr. D. Armour Hillstrom
Patricia and Robert Hirt
Sally L. Holder
Anita and Sidney Holec
Bob Hopper
Kathleen Howard
Cheryl S. and Carl W. Huber, Jr Pat and Jay Hudson
Mr. and Mrs. Wilmot W. Irish
Mary Ellen and Robert Ivers
Bob and Gretchen Jahlring
Lois Johnston Walpole James

THE ELEANOR B. DAUGHERTY SOCIETY

CHAUTAUQUA FOUNDATION
OFFICERS, DIRECTORS AND STAFF

Directors

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

Term Expires
2016
ii
2017

Office, Directors and Staff

Officers

Steven W. Percy • Chairman
John S. Connolly, Jr. • Vice Chairman
George L. Follansbee, Jr. • Chief Executive Officer
Deborah E. Moore, CPA • Treasurer & Chief Financial Officer
Linda Jordan Loomis • Corporate Secretary

Staff

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

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

1 - Audit Committee
2 - Development Council
3 - Executive Committee
4 - Finance Committee
5 - Investment Committee
6 - Nominating & Governance Committee
7 - Personnel Committee
**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  
William G. Karslake - August 1994 to August 1995  
Thomas R. Bromeley - August 1995 to June 2001  
vic gelb - August 1995 to August 2011  
Selina P. Johnson - August 1996 to August 2008  
Wilfred R. Konneker - January 1996 to August 2006  
Lowell K. Strohl - August 1996 to February 2010  
Miriam S. Reading - January 1997 to August 2006  
Martin Coyle - August 2000 to November 2003  
Wendy Cohen - August 2001 to May 2011  
Scott McVay - January 2001 to December 2003  
Allen Short - August 2001 to August 2005  
Fred C. Gregory - August 2004 to August 2008  
John W. Burden, III - August 2004 to October 2007  
Kathryn J. Lincoln - August 2005 to December 2011  
I. Hale Oliver - August 2005 to August 2013  
Georgia T. Snyder - August 2006 to August 2007  
John A. Corry - January 2008 to August 2013  
Charlotte A. Fowler - August 2008 to December 2012

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**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  
Harold F. Reed - August 1957 to August 1967  
Richard H. Miller - August 1971 to August 1996  
Lowell K. Strohl - August 2002 to August 2008
2015 Annual Membership Meeting
Saturday, August 22 • 9 a.m.