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STATEMENT OF PURPOSE

Article II, Corporate Charter May 14, 1937

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

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

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

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

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

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

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

MISSION STATEMENT

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

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

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

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

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

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

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

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

Annually, setting the amount to be distributed to the Institution for the subsequent year of the Institution’s operations is the single most significant action undertaken by the Foundation’s board. Again this past year, the “payout” decision made in June 2015 to determine the distribution for 2016 helped set the course for the Institution’s budget planning for this summer and the quality of the program delivered.

However this past year was not an ordinary year. During the fiscal year that ended at the conclusion of March, the Foundation and the Institution extended its normal collaborative conversations and produced results that will have a deep impact on the life of the Institution. As a result of several years of discussion among the leaders of the two boards, the board of the Foundation agreed to participate in the Amphitheater project and be a critical element in the Institution’s Board of Trustee’s determination to proceed with the renewal of that space.

At its meeting last fall, the Foundation’s board agreed to provide interim financing to help cover the costs committed to the construction of the facility during the time in which donors agreed to pay their individual pledges. In order to do so without affecting the make-up of our invested portfolio, the Foundation entered into a line of credit with First Niagara Bank to cover any draw on capital that will ultimately be repaid through pledge payments.

**Chautauqua’s Promise**

Committed amounts as of March 31, 2016

<table>
<thead>
<tr>
<th>Unspecified Endowment</th>
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<th>The Lake, the Grounds, and Public Spaces</th>
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Secondly, the Foundation decided to reallocate an unrestricted testamentary gift that was received during the Promise Campaign, with the knowledge and concurrence of the donor’s widow, to the Amphitheater project. With this gift and others generated both within and prior to the Promise Campaign’s commencement, adequate philanthropic funding was available to proceed with the Amphitheater project.

Both of these decisions required considerations by the directors of the Foundation that were new and necessitated a level of dialogue and cooperation that had not before been required of our two organizations. The determining factor throughout these deliberations was what served the best interests of Chautauqua Institution, the Foundation’s sole beneficiary.

Of course the Foundation’s board was happily put into the position of making these decisions as a result of the generosity of Chautauquans who invested in the Amphitheater during the Promise Campaign. The Foundation is responsible for all philanthropy that benefits Chautauqua — endowment, annual giving and capital support — and we are grateful to all who enabled the campaign to reach $95 million by the end of the 2016 fiscal year, the fifth of this six-year campaign which will conclude December 31, 2016. At this writing, gifts to the Promise Campaign exceed $97 million.

This past year has been neither routine or without significance. The staff of the Foundation and the directors have been challenged and enthused by the opportunity to look anew at how we conduct our business and work with the Institution in service to this community.

As you read through this report you will see detailed information concerning the Foundation’s balance sheet, invested assets, asset allocation and performance during the year. We welcome your questions about any of this information or any issue regarding the Foundation. In these pages, you will also see a record of the philanthropy that has specifically benefitted the Foundation during its past year. Gifts to the Chautauqua Fund and for capital purposes are recognized each year in the off-season winter Chautauquan.

To all of you who help Chautauqua flourish with your gifts, we thank you. We are eager to work with you in the months and years ahead to build a deeper relationship and a stronger and more effective Institution.

Sincerely,

Cathy Bonner, Chair, Board of Directors

Geof Follansbee, Chief Executive Officer

<table>
<thead>
<tr>
<th>Chautauqua’s Amphitheater</th>
<th>Endowed Scholarships</th>
<th>Leadership Endowment</th>
<th>Program Enhancements and Innovation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Capital Goal:</strong> $30 million</td>
<td><strong>Goal:</strong> $2 million</td>
<td><strong>Goal:</strong> $2.5 million</td>
<td><strong>Goal:</strong> $8 million</td>
</tr>
<tr>
<td><strong>Committed:</strong> $39.1 million</td>
<td><strong>Committed:</strong> $1.5 million</td>
<td><strong>Committed:</strong> $2 million</td>
<td><strong>Committed:</strong> $11.3 million</td>
</tr>
<tr>
<td><strong>Endowment for Maintenance Goal:</strong> $3.5 million</td>
<td><strong>Committed:</strong> $519,000</td>
<td></td>
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</tbody>
</table>
Total Philanthropic Activity

In this past fiscal year, Chautauquans have generously supported Chautauqua Institution with nearly $22 million in total philanthropy which includes pledges, outright gifts and planned gifts.

The information below is based on fiscal years ended on March 31. Certain amounts in prior periods have been reclassified to reflect gifts transferred to a different category.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Chautauqua Fund</th>
<th>Endowment</th>
<th>Capital &amp; Other</th>
<th>Total</th>
<th>Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$3,707,326</td>
<td>$9,326,210</td>
<td>$8,834,104</td>
<td>$21,867,640</td>
<td>2,973</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>
<td>2,873</td>
</tr>
<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>7,054,029</td>
<td>7,469,254</td>
<td>18,037,647</td>
<td>3,185</td>
</tr>
<tr>
<td>2012</td>
<td>3,566,002</td>
<td>4,209,622</td>
<td>2,735,031</td>
<td>10,510,655</td>
<td>3,351</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 in the winter Chautauquan.

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 32–39.

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 in the winter Chautauquan.
Five-Year Average Cost of Fundraising
The costs of fundraising efforts performed by the Foundation on behalf of the Institution are reported in the Foundation’s audited financial statements. These costs provide all three categories of philanthropy to the Institution. The five-year average of such costs as a percentage of total philanthropy has decreased from 11.1% to 6.3% over the past 5 years.

Total Giving by Area of Support
This chart represents total philanthropy of $21.9 million for the fiscal year ended March 31, 2016 by area of support.
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 who have pledged or transferred, outright or as part of certain planned gift commitments, to the annual Chautauqua Fund, capital projects or endowment a cumulative amount in excess of $250,000.

We have highlighted donors new to this list in orange.

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

- Susan and Tom Hagen
- Mary and Oliver Langenberg
- Patty and Spencer Van Kirk, III

**$2,500,000 to $4,999,999**

- The Carnahan-Jackson Foundation
- Jack Connolly
- Emily and John Corry
- Gebbie Foundation, Inc.
- The Hultquist Foundation, Inc.
- The Lenna Foundation
- Elizabeth S. Lenna
- Joan and David Lincoln
- Lippman Kanfer Family Foundation
- Kay H. Logan
- Richard and Elaine Rieser
- Ralph C. Sheldon Foundation, Inc.
- Mr. and Mrs. Richard K. Smucker
- Lowell and Rebecca Strohl and Family

**$1,000,000 to $2,499,999**

- Mr. and Mrs. Edward P. Boyle
- Jean and Tom Bromley
- Mrs. Robert D. Campbell
- Chautauqua Women’s Club, Inc.
- Mr. and Mrs. George L. Cornell
- Dr. and Mrs. R. William Cornell
- Mrs. Robert W. Cornell
- Mrs. Grant A. Dibert
- Lauren Rich Fine and Gary Giller
- Mr. and Mrs. Robert K. Fletcher
- Char and Chuck Fowler
- Barbara and Peter Georgescu
- Mr. and Mrs. 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
- Cathy and Jesse Marion
- Mary Anne and John Morefield
- New York State Council on the Arts
- Hale and Judy Oliver
- Steve and Polly Percy
- Harold and Martha Reed
- Mr. and Mrs. Robert M. Smith
- Mr. and Mrs. Ralph Swingle
- Helen Truman Trust

**$500,000 to $999,999**

- Dorothy L. Anderson
- Arnold and Jill Bellowe
- Caroline Van Kirk Bissell
- Gary M. and Willow R. Brost
- Andrew L. and Gayle Shaw
- Camden
- Mr. and Mrs. David H. Carnahan
- Town of Chautauqua
- Wendy and Edward Cohen
- John C. Court Family Foundation
- Eleanor B. Daugherty
- Mr. and Mrs. Joseph H. DeFrees
- Charles Edison Fund
- Mr. and Mrs. George L. Follansbee
- Mimi and Jim Gallo
- General Electric Foundation
- Jane A. Gross
- Thomas and Kathleen Harrick
- Dorothy and Bill Hill
- Dr. Michael G. and Carol Nobel Hirsh
- Karin A. Johnson
- Trust of William D. Kuhns
- Jim and Lynn Levinson
- Lilly Endowment, Inc.
- Helen T. Logan Charitable Trust
- Dr. and Mrs. John W. McCrede, Jr.
- Robert and Sally Metzgar
- Mr. and Mrs. John A. Milos
- George E. and Susan Moran Murphy
- Ralph H. and Elizabeth C. Norton Philanthropic Trust
- Office Depot Foundation, Inc.
- Miriam S. Reading and Richard H. Miller
- Mr. and Mrs. H. Parker Sharp
- Mr. and Mrs. J. Bruce Stromgren
- Robert and Joyce Tate
- The Turney Family
- Mr. and Mrs. Robert O. Wilder

**$250,000 to $499,999**

- Edward L. Anderson, Jr.
- Foundation, Inc.
- Andy and Peggy Anderson
- John E. Anderson
- Sandy and Quint Anderson
- Edward L. Anderson and Joan E. Parsons
- Clement and Karen Arrison Foundation
- Barbara and Arthur Banner
- Mr. and Mrs. Richard L. Bechtolt
- June Bonyor
- Mary Boyle and Ted Arnn
- P. James and Barbara A. Brady
- Kathy and James Braham
- Twig and Barbara Branch
- Mr. and Mrs. John E. Britton
- John W. and Anne Staples Burden
- Chautauqua County Visitors’ Bureau
- Chautauqua Opera Guild
- Geoff and Kathie Church
- Marty and Sandy Coyle
- The Crockett Family
- The Jessie Smith Darrah Fund
- The Winifred C. Dibert Foundation, Inc.
- June and Barry Dietrich
- Elizabeth Elser Doolittle Charitable Trust
- Shirley A. and Arthur R. Duffy
- Arthur E. Earley
- Mr. and Mrs. Hal A. Fausnough
- Mr. and Mrs. James L. Flynn
- Dr. and Mrs. Myron B. Franks
- Chip and Gail Gamble
- Vic and Joan Gelb
- Mr. and Mrs. Timothy B. Goodell
- S. Allen Goodwin
- Jim and Elisabeth Groninger
- Becky and Fred K. Habenicht, Jr.
- Kathleen E. Hancock
- Ms. Verna Harrah
- Lisa Heinz
- Bill and Angela James
- The Johnson Foundation
- W. Alton Jones Foundation
- Kevin and Joan Keogh
- Ron and Rosie Kilpatrick
- Mary Kuhns Trust
- Blossom Leibowitz
- Mrs. John C. Lincoln
- James H. Lynch, Jr.
- Dr. Barb Mackey
- Chris and Sue Martin
- Warren K. Martin
- Dr. and Mrs. Frank E. McElree, Jr.
- Bruce W. and Sarah Hagen McWilliams
- Cornelia Chason Miller
- Ministrare, Inc.
- Miss Jane C. Morgan
- Mr. and Mrs. Lewis W. Morgan
- National Endowment for the Arts
- Steve and Anne Odland
- The John R. Oishei Foundation
- The Estate of Gail Clement Olson
- Robert A. Ott, Jr.
- Mr. and Mrs. William H. Park
- Deloras Pemberton
- Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
EVERY GIFT MATTERS

Sheila Penrose and Ernest Mahaffey
PNC Financial Services Group
Richard A. and Esther M. Popp
Mrs. Lois Raynow
Mrs. Bartlett Richards
Molly F. Rinehart and Charles L. Christian
Marjorie McCarthy Robins
Joseph H. & Florence E. Roblee Foundation
Herbert B. and Gerda Sachse
Mr. and Mrs. Ralph C. Sheldon, Jr.
Mr. and Mrs. Henry B. Suhr, Jr.
Susan and John Turben Foundation
John and Linda Wadsworth
Dr. and Mrs. Robert J. Weiss
Norman and Marilyn Weizenbaum
The Margaret L. Wendt Foundation
Lutie Soper Wilsdon Memorial
Virginia H. and Robert R. Young
Mr. and Mrs. Howard Zemsky
Sam and Shirley Zemsky
Steve Zenczak and Pat Feighan

DAVID AND JOAN LINCOLN

David and Joan Lincoln's generosity is omnipresent at Chautauqua. Spending many years with their family enjoying all or part of their summers here, David and Joan have left their indelible mark on Chautauqua.

For nineteen years the Lincoln family’s support and devotion to the exploration of ethical behavior has created the Lincoln Program in Applied Ethics, a cornerstone program that has become entrenched in Chautauqua’s programming. The program originally sponsored ethics scholars during one week of the season, but beginning in 2015 it was expanded to allow Chautauquans to explore the ethical implications of a variety of topics that shape their lives throughout the season.

Joan Lincoln passed away March 7, 2016 at the age of 88. She loved to describe her passion as “playing with mud.” Joan and David’s generosity is of particular significance to Joan and her fellow “mudders,” at the Joan R. Lincoln Ceramics Center at the Arts Quad and through the endowment for ceramics that bears her name. Speaking at Joan’s memorial service in Paradise Valley, Arizona, where Joan had served as mayor for several years, Tom Becker described Joan as follows: “Joan was an artist of rare skill, expansive experience, discipline, urgency of purpose, clarity of expression. And ultimately one with an abundance of wonder and awe at the dazzling beauty of life and the expression of mystery that runs through it. Joan Lincoln was a beautiful human being. She made her life — as a wife, mother, grandmother, mayor, educator, collector, and potter — a work of art.”

Most recently and as part of the Promise Campaign, with proceeds from the sale of a family residence gifted to the Foundation, David Lincoln made a significant addition to the Helen Colvill Lincoln Fund. This permanent endowment provides for the care and maintenance of the John C. Lincoln Dormitory which was funded by Helen Lincoln, David’s mother, in memory of her late husband and David’s father, John. The dormitory provides housing for Chautauqua’s fine and performing arts students each summer.

Chautauqua Institution and our community have benefited greatly from Joan and David Lincoln’s tenacity to use their passions to transform the world around them.

E V E R Y   G I F T   M A T T E R S
Financial Overview

Total assets of the Foundation were $87.4 million as of March 31, 2016 and net assets were $78.9 million. The Foundation acquired the Lewis Miller Cottage through a generous gift from a donor, to be held temporarily by the Foundation and ultimately transferred to the Institution. Also during the year, the Foundation’s board of directors decided to transfer an unrestricted gift to the Institution for use in the Amphitheater project. The gift, still payable to the Institution as of March 31, 2016, was mostly held in a separate account at Hirtle Callaghan & Co. for temporarily restricted funds.

The Foundation also made changes in the presentation of the audited financial statements. Certain funds were reclassified to unrestricted net assets and the footnotes for net assets were revised to explain the different components of net assets. Additional categories were added to the Statement of Activities and the Supplemental Schedule of Expenses to further distinguish between activity in temporarily restricted funds and the endowment.

Endowment Net Assets

The net asset balance of the 693 active endowment funds as of March 31, 2016 was $71.2 million. This balance represents the sum total of each endowment fund as of March 31, 2016. Endowment funds are comprised of board-designated, term, and permanently 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, 2016 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’s distribution and the prorata payout from new gifts received during the year and increasing that amount by an inflation factor. Additionally, in 2016 the decision to transfer an unrestricted gift treated as if it were endowment to the Institution for the Amphitheater project is reported as support from endowment. The amount to be distributed from temporarily restricted funds is determined annually by the donors and the Foundation.

<table>
<thead>
<tr>
<th></th>
<th>fiscal year 3/31/16</th>
<th>fiscal year 3/31/15</th>
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</thead>
<tbody>
<tr>
<td><strong>Direct Support to the Institution</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support from Endowment</td>
<td>$ 7,006,585</td>
<td>$ 1,953,231</td>
</tr>
<tr>
<td>Support from Temporarily Restricted Funds</td>
<td>1,068,953</td>
<td>215,951</td>
</tr>
<tr>
<td>Annual Support from the Chautauqua Fund</td>
<td>3,707,326</td>
<td>3,974,259</td>
</tr>
<tr>
<td></td>
<td>$11,782,864</td>
<td>$ 6,143,441</td>
</tr>
<tr>
<td><strong>Indirect Support to the Institution</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Expense</td>
<td>$ 1,262,407</td>
<td>$ 1,321,813</td>
</tr>
<tr>
<td>Reimbursement by the Institution</td>
<td>(350,000)</td>
<td>(350,000)</td>
</tr>
<tr>
<td></td>
<td>$ 912,407</td>
<td>$ 971,813</td>
</tr>
</tbody>
</table>
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 $47.3 million as of March 31, 2016. The discounted value of unconditional contributions receivable recorded in the financial statements was $4.6 million as of March 31, 2016. 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.

The chart above depicts gross endowment contributions receivable in thousands.

March 31, 2016

<table>
<thead>
<tr>
<th>Contributions Receivable</th>
<th>Specified</th>
<th>Unspecified</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unconditional contributions receivable</td>
<td>$ 2,130,300</td>
<td>$ 9,133,626</td>
<td>$ 11,263,926</td>
</tr>
<tr>
<td>Conditional contributions receivable</td>
<td>25,480,803</td>
<td>10,580,345</td>
<td>36,061,148</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 27,611,103</strong></td>
<td><strong>$ 19,713,971</strong></td>
<td><strong>$ 47,325,074</strong></td>
</tr>
</tbody>
</table>

Unconditional contributions receivable as of March 31, 2016

<table>
<thead>
<tr>
<th>Contributions Receivable</th>
<th>Gross</th>
<th>Discount</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pooled Life Income Fund</td>
<td>$ 3,331,637</td>
<td>$ 1,741,779</td>
<td>$ 1,589,858</td>
</tr>
<tr>
<td>Irrevocable Trusts</td>
<td>6,703,485</td>
<td>4,761,970</td>
<td>1,941,515</td>
</tr>
<tr>
<td>Cash Pledges</td>
<td>1,228,804</td>
<td>120,502</td>
<td>1,108,302</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 11,263,926</strong></td>
<td><strong>$ 6,624,251</strong></td>
<td><strong>$ 4,639,675</strong></td>
</tr>
</tbody>
</table>

Conditional contributions receivable as of March 31, 2016

- Bequests | $ 21,138,076 |
- Retirement Plans | 9,305,527 |
- Life Insurance | 534,939 |
- Revocable Trusts | 5,082,606 |
| **Total** | **$ 36,061,148** |
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 $83.2 million in invested assets, comprised of the following portfolios:

1) Endowment ($74.2 million)
2) Temporarily restricted ($5.2 million)
3) Pooled life income fund ($3.3 million)
4) Custodial ($0.5 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, managed by Blackstone Alternative Asset Management and Pointer Management, LLC. The pooled life income fund is managed by Key Private Bank.

During the fiscal year, the Investment Committee conducted a comprehensive review of proposals from other managers and ultimately decided to remain with Hirtle, Callaghan & Co., LLC.

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 $57.6 million of the endowment and $16.6 million of the endowment is invested in the two funds of hedge funds.

2) Temporarily restricted funds are held and managed separately from permanently restricted 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) The management and investment strategy of the pooled life income fund (PLIF) is reviewed annually with Key Private Bank. At March 31, 2016, 35% of the PLIF assets were invested in equities, 56% in fixed income assets and 9% in alternative investments.

4) Funds held in custody for the Institution to meet the debt service for the Turner Community Center had a market value of $486,180 as of March 31, 2016. 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 $34.7 million over the past 15 years, from $39.5 million as of March 31, 2001 to $74.2 million as of March 31, 2016.
Endowment Asset Allocation 2016

Total endowment portfolio market value was $74.2 million and as of March 31, 2016 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 fiscal year ended March 31, 2016 was a challenging year for investment returns, producing a loss of 4.9%. The 10-year return surpassed the diversified benchmark in each of the preceding 3 years. 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.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Return</td>
<td>6.2%</td>
<td>6.0%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Benchmark</td>
<td>5.7%</td>
<td>5.3%</td>
<td>3.4%</td>
</tr>
</tbody>
</table>
The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of March 31, 2016 and 2015, 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, 2016 and 2015 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 21, 2016
### March 31, 2016

**Assets:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$312,259</td>
<td>$1,411,505</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>4,639,675</td>
<td>6,445,776</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>80,222,524</td>
<td>83,899,022</td>
</tr>
<tr>
<td>Property and equipment, net (Note 4)</td>
<td>37,038</td>
<td>43,122</td>
</tr>
<tr>
<td>Other assets</td>
<td>2,219,333</td>
<td>360,754</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$87,430,829</strong></td>
<td><strong>$92,160,179</strong></td>
</tr>
</tbody>
</table>

**Liabilities and Net Assets:**

**Liabilities:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable to the Institution (Note 5)</td>
<td>$7,560,735</td>
<td>$2,422,721</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>446,721</td>
<td>726,585</td>
</tr>
<tr>
<td>Amounts held in custody for others (Note 6)</td>
<td>486,180</td>
<td>628,283</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>8,493,636</strong></td>
<td><strong>3,777,589</strong></td>
</tr>
</tbody>
</table>

**Net Assets (Note 7):**

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>3,888,034</td>
<td>11,102,357</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>9,516,117</td>
<td>13,135,705</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>65,533,042</td>
<td>64,144,528</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>78,937,193</strong></td>
<td><strong>88,382,590</strong></td>
</tr>
</tbody>
</table>

**Total Net Assets**                          **$87,430,829** | **$92,160,179**

See accompanying notes.
**STATEMENTS OF ACTIVITIES**

For the year ended March 31, 2016

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</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>$</td>
<td>$ 3,707,326</td>
<td>$</td>
<td>$ 3,707,326</td>
</tr>
<tr>
<td>Endowment</td>
<td>49,062</td>
<td>39,087</td>
<td>3,089,754</td>
<td>3,177,903</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>2,247,794</td>
<td>-</td>
<td>2,247,794</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>(15,585)</td>
<td>-</td>
<td>(1,701,240)</td>
<td>(1,716,825)</td>
</tr>
<tr>
<td>Total contributions</td>
<td>33,477</td>
<td>5,994,207</td>
<td>1,388,514</td>
<td>7,416,198</td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>155,461</td>
<td>1,051,855</td>
<td>-</td>
<td>1,207,316</td>
</tr>
<tr>
<td>Net realized and unrealized losses</td>
<td>(548,464)</td>
<td>(4,020,678)</td>
<td>-</td>
<td>(4,569,142)</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td>(359,526)</td>
<td>3,025,384</td>
<td>1,388,514</td>
<td>4,054,372</td>
</tr>
</tbody>
</table>

| **Expenses:** |              |                        |                        |         |
| Support to the Institution: |              |                        |                        |         |
| Chautauqua Fund | 3,707,326 | - | - | 3,707,326 |
| Endowment direct support | 7,006,585 | - | - | 7,006,585 |
| Support from other funds | 1,068,953 | - | - | 1,068,953 |
| Development (Note 6) | 912,407 | - | - | 912,407 |
| General and administrative | 804,498 | - | - | 804,498 |
| **Total expenses** | 13,499,769 | - | - | 13,499,769 |

| Net assets released from restrictions | 6,644,972 | (6,644,972) | - | - |
| Change in net assets | (7,214,323) | (3,619,588) | 1,388,514 | (9,445,397) |
| Net assets - beginning | 11,102,357 | 13,135,705 | 64,144,528 | 88,382,590 |
| **Net assets - ending** | $ 3,888,034 | $ 9,516,117 | $ 65,533,042 | $ 78,937,193 |

See accompanying notes.
For the year ended March 31, 2015

Revenues:

Contributions:

Cash received:

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chautauqua Fund</td>
<td>$ -</td>
<td>$ 3,974,259</td>
<td>$ -</td>
<td>$ 3,974,259</td>
</tr>
<tr>
<td>Endowment</td>
<td>500,074</td>
<td>31,947</td>
<td>6,438,303</td>
<td>6,970,324</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>332,825</td>
<td>-</td>
<td>332,825</td>
</tr>
</tbody>
</table>

Valuation adjustments and new pledges, net of collections

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total contributions</td>
<td>564,237</td>
<td>4,351,273</td>
<td>4,555,876</td>
<td>9,471,386</td>
</tr>
</tbody>
</table>

Interest and dividends

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>154,261</td>
<td></td>
<td>987,366</td>
<td>-</td>
<td>1,141,627</td>
</tr>
</tbody>
</table>

Net realized and unrealized gains

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>296,928</td>
<td></td>
<td>1,860,298</td>
<td>-</td>
<td>2,157,226</td>
</tr>
</tbody>
</table>

Total revenues

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,015,426</td>
<td>7,198,937</td>
<td>4,555,876</td>
<td></td>
<td>12,770,239</td>
</tr>
</tbody>
</table>

Expenses:

Support to the Institution:

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chautauqua Fund</td>
<td>3,974,259</td>
<td>-</td>
<td>-</td>
<td>3,974,259</td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>1,953,231</td>
<td>-</td>
<td>-</td>
<td>1,953,231</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>215,951</td>
<td>-</td>
<td>-</td>
<td>215,951</td>
</tr>
<tr>
<td>Development (Note 6)</td>
<td>971,813</td>
<td>-</td>
<td>-</td>
<td>971,813</td>
</tr>
<tr>
<td>General and administrative</td>
<td>765,810</td>
<td>-</td>
<td>-</td>
<td>765,810</td>
</tr>
</tbody>
</table>

Total expenses

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7,881,064</td>
<td></td>
<td>-</td>
<td>-</td>
<td>7,881,064</td>
</tr>
</tbody>
</table>

Net assets released from restrictions

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7,413,615</td>
<td>(7,413,615)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Change in net assets

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>547,977</td>
<td>(214,678)</td>
<td>4,555,876</td>
<td></td>
<td>4,889,175</td>
</tr>
</tbody>
</table>

Net assets - beginning

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,554,380</td>
<td>13,350,383</td>
<td>59,588,652</td>
<td></td>
<td>83,493,415</td>
</tr>
</tbody>
</table>

Net assets - ending

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 11,102,357</td>
<td>$ 13,135,705</td>
<td>$ 64,144,528</td>
<td>$</td>
<td>$ 88,382,590</td>
</tr>
</tbody>
</table>

See accompanying notes.
For the years ended March 31, 2016  2015

Operating activities:

Change in net assets $ (9,445,397)  $ 4,889,175

Adjustments to reconcile change in net assets to net cash flows from operating activities:

Net realized and unrealized (gains) losses 4,569,142  (2,157,226)
Depreciation 8,940  13,785

Changes in other operating assets and liabilities:

Contributions receivable 1,806,101  1,879,079
Other assets (1,858,579)  1,219
Payable to the Institution 5,138,014  357,926
Accounts payable and accrued expenses (279,864)  475,679
Amounts held in custody for others (142,103)  (137,096)

Net operating activities (203,746)  5,322,541

Investing activities:

Purchases of property and equipment (2,856)  (6,992)
Purchases of investments (12,428,412)  (17,964,925)
Proceeds from sales of investments 11,535,768  13,594,297

Net investing activities (895,500)  (4,377,620)

Net change in cash (1,099,246)  944,921
Cash - beginning 1,411,505  466,584

Cash - ending $ 312,259  $ 1,411,505

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 21, 2016, 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.

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.

Property held by the Foundation for which the intended use is not related to Foundation operations are included in other assets in the statements of financial position.

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, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement 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 or the Institution are not recorded as revenue until such time as the conditions are substantially met, and totaled $36,061,000 and $31,247,000 at March 31, 2016 and 2015.

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. The Foundation believes it is no longer subject to examination by Federal and State taxing authorities for years prior to 2013.

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.

Reclassifications:
The financial statements for the year ended March 31, 2015 have been reclassified to conform with the presentation adopted for 2016.

2. Contributions Receivable:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pooled life income funds</td>
<td>$3,331,637</td>
<td>$3,671,043</td>
</tr>
<tr>
<td>Charitable remainder trusts</td>
<td>6,703,485</td>
<td>6,680,811</td>
</tr>
<tr>
<td>Unconditional promises to give</td>
<td>1,228,804</td>
<td>2,502,122</td>
</tr>
<tr>
<td>Estates</td>
<td>-</td>
<td>675,000</td>
</tr>
<tr>
<td></td>
<td>11,263,926</td>
<td>13,528,976</td>
</tr>
<tr>
<td>Less discount</td>
<td>6,624,251</td>
<td>7,083,200</td>
</tr>
<tr>
<td></td>
<td>$ 4,639,675</td>
<td>$ 6,445,776</td>
</tr>
</tbody>
</table>

Contributions receivable at March 31, 2016 are expected to be received over the periods shown below:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>$409,144</td>
<td></td>
</tr>
<tr>
<td>One through five years</td>
<td>814,660</td>
<td></td>
</tr>
<tr>
<td>Greater than five years</td>
<td>10,040,122</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$11,263,926</td>
<td></td>
</tr>
</tbody>
</table>
3. Investments:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketable securities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$7,871,158</td>
<td>$4,565,966</td>
</tr>
<tr>
<td>Equities</td>
<td>37,791,242</td>
<td>44,108,500</td>
</tr>
<tr>
<td>Fixed income securities</td>
<td>10,620,491</td>
<td>11,511,322</td>
</tr>
<tr>
<td>Alternative investments</td>
<td>23,587,155</td>
<td>23,371,090</td>
</tr>
<tr>
<td>Other</td>
<td>352,478</td>
<td>342,144</td>
</tr>
<tr>
<td></td>
<td>$80,222,524</td>
<td>$83,899,022</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>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redeemable semiannually with 75 to 105 days notice</td>
<td>$16,611,918</td>
<td>$17,053,592</td>
</tr>
<tr>
<td>Illiquid with return of capital allowed at varying dates during the period 2017 through 2026</td>
<td>6,975,237</td>
<td>6,317,498</td>
</tr>
<tr>
<td></td>
<td>$23,587,155</td>
<td>$23,371,090</td>
</tr>
</tbody>
</table>

The Foundation has committed capital of approximately $15,480,000 to private equity alternative investments. The unfunded portion of the commitments total approximately $6,680,000 as of March 31, 2016.

Investment management fees of $599,881 and $606,601 for 2016 and 2015 are recorded in the statements of activities as follows:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees netted against interest and dividend income</td>
<td>$169,227</td>
<td>$186,732</td>
</tr>
<tr>
<td>General and administrative expense</td>
<td>430,654</td>
<td>419,869</td>
</tr>
<tr>
<td></td>
<td>$599,881</td>
<td>$606,601</td>
</tr>
</tbody>
</table>

4. Property and equipment:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</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>160,485</td>
<td>157,629</td>
</tr>
<tr>
<td></td>
<td>325,260</td>
<td>322,404</td>
</tr>
<tr>
<td>Less accumulated depreciation</td>
<td>288,222</td>
<td>279,282</td>
</tr>
<tr>
<td></td>
<td>$37,038</td>
<td>$43,122</td>
</tr>
</tbody>
</table>

5. Payable to the Institution:

Amounts payable at March 31:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income and principal</td>
<td>$7,061,587</td>
<td>$1,998,994</td>
</tr>
<tr>
<td>Income from prior periods</td>
<td>499,148</td>
<td>423,727</td>
</tr>
<tr>
<td></td>
<td>$7,560,735</td>
<td>$2,422,721</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 2016 and 2015 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 2016 and 2015 development expenses in the accompanying statements of financial position and activities, respectively.

The Foundation guarantees a promissory note payable by the Institution totaling $670,245 at March 31, 2016. Amounts held by the Foundation on behalf of the Institution to help repay the note totaled $486,180 and $628,283 at March 31, 2016 and 2015.

On May 12, 2016, the Foundation obtained a $25,000,000 bank revolving credit note to facilitate financing the renovation of the Institution’s amphitheater. 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.

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.

7. Net Assets:

Unrestricted net assets include board-designated endowment funds and unrestricted gifts available upon request by the Institution. From time to time the market value of certain endowment funds is lower than the original gifted values due to investment experience. These amounts are included in unrestricted net assets as underwater funds.

The composition of unrestricted net assets is as follows:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board-designated endowments</td>
<td>$4,587,239</td>
<td>$10,223,041</td>
</tr>
<tr>
<td>Unrestricted funds</td>
<td>922,932</td>
<td>916,748</td>
</tr>
<tr>
<td>Underwater funds</td>
<td>(1,622,137)</td>
<td>(37,432)</td>
</tr>
<tr>
<td></td>
<td>$3,888,034</td>
<td>$11,102,357</td>
</tr>
</tbody>
</table>
Temporarily restricted net assets are comprised of unappropriated endowment gains and restricted gifts as follows:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$3,913,661</td>
<td>$7,418,091</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>1,205,946</td>
<td>2,421,404</td>
</tr>
<tr>
<td>Term endowments</td>
<td>2,498,729</td>
<td>2,853,456</td>
</tr>
<tr>
<td>Temporarily restricted gifts</td>
<td>1,897,781</td>
<td>442,754</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$9,516,117</strong></td>
<td><strong>$13,135,705</strong></td>
</tr>
</tbody>
</table>

Permanently restricted net assets represent the accumulated principal of endowment gifts that have been restricted by donors to be maintained by the Foundation in perpetuity. Permanently restricted net assets are comprised of the following endowment gift categories:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$44,813,173</td>
<td>$43,268,671</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>20,719,869</td>
<td>20,875,857</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$65,533,042</strong></td>
<td><strong>$64,144,528</strong></td>
</tr>
</tbody>
</table>

8. Retirement Plan:
The Foundation participates in a 403(b) retirement plan for substantially all employees, subject to plan conditions. The Foundation contributes 10% of the employee’s gross pay each year. Funded contributions and costs totaled $72,000 and $80,000 for the years ended March 31, 2016 and 2015.

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, 2016 and 2015 were determined based on quoted prices in active markets.

---

LEWIS MILLER COTTAGE

When the historic Lewis Miller Cottage, located in Miller Park, was placed on the market there were many who thought that the logical next owner of this unique home was the Institution. One person stepped forward and made that possible. Longtime Chautauquan, preservationist and philanthropist Tom Hagen was keen on preserving the former home of one of the Institution’s co-founders Lewis Miller, and later Miller’s daughter Mina and her husband, Thomas Edison.

Lewis Miller Cottage, built in 1875, was designated a National Historic Landmark in 1966. Hagen recognized the unique appropriateness of the Institution owning the only remaining founder’s cottage, directly across from where the Assembly first met, and decided to donate the funds to allow the Chautauqua Foundation to purchase the house from then-owners and Miller descendants, Ted Arnn and Kim Arnn.

For 141 years the cottage had remained in one family and undergone only one major renovation in the early 1920’s by Mina Miller Edison. Much of the cottage remains as it was then including the furniture, finishes and fixtures. Impeccably cared for and maintained over the years by Lewis Miller’s heirs, the cottage stands as a tangible connection to Chautauqua’s history.
10. Endowment Assets:
The Foundation’s endowment assets are comprised of board-designated endowment, term endowments 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 typically ranges 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 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.

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 unrestricted net assets. Investment income related to the donor-restricted and term endowments is reported as an increase (decrease) to temporarily restricted net assets until appropriated in accordance with the Foundation’s spending policy. The Foundation’s endowment assets activity for the years ended March 31, 2016 and 2015 is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted (Board-designated)</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$10,223,041</td>
<td>$12,692,951</td>
<td>$64,144,528</td>
<td>$87,060,520</td>
</tr>
<tr>
<td>Investment income:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>$139,700</td>
<td>$1,047,863</td>
<td>-</td>
<td>$1,187,563</td>
</tr>
<tr>
<td>Net losses</td>
<td>(543,668)</td>
<td>(4,005,492)</td>
<td>-</td>
<td>(4,549,160)</td>
</tr>
<tr>
<td>Total investment loss</td>
<td>(403,968)</td>
<td>(2,957,629)</td>
<td>-</td>
<td>(3,361,597)</td>
</tr>
<tr>
<td>Contributions</td>
<td>33,477</td>
<td>255,451</td>
<td>1,388,514</td>
<td>1,677,442</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(5,265,311)</td>
<td>(2,372,437)</td>
<td>-</td>
<td>(7,637,748)</td>
</tr>
<tr>
<td>Endowment assets - end of year</td>
<td>$4,587,239</td>
<td>$7,618,336</td>
<td>$65,533,042</td>
<td>$77,738,617</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted (Board-designated)</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$9,710,286</td>
<td>$12,814,510</td>
<td>$59,588,652</td>
<td>$82,113,448</td>
</tr>
<tr>
<td>Investment income:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>$142,383</td>
<td>984,396</td>
<td>-</td>
<td>$1,126,779</td>
</tr>
<tr>
<td>Net gains</td>
<td>278,023</td>
<td>1,860,727</td>
<td>-</td>
<td>2,138,750</td>
</tr>
<tr>
<td>Total investment income</td>
<td>420,406</td>
<td>2,845,123</td>
<td>-</td>
<td>3,265,529</td>
</tr>
<tr>
<td>Contributions</td>
<td>564,237</td>
<td>31,947</td>
<td>4,555,876</td>
<td>5,152,060</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(471,888)</td>
<td>(2,372,437)</td>
<td>-</td>
<td>(3,474,325)</td>
</tr>
<tr>
<td>Endowment assets - end of year</td>
<td>$10,223,041</td>
<td>$12,692,951</td>
<td>$64,144,528</td>
<td>$87,060,520</td>
</tr>
</tbody>
</table>
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, 2016 and 2015 and have issued our report thereon dated June 21, 2016 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, 2016 and 2015 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 21, 2016

INDEPENDENT AUDITORS' REPORT ON ADDITIONAL INFORMATION

For the years ended March 31, 2016 2015

Support to the Institution:  
Chautauqua Fund $ 3,707,326 $ 3,974,259

Endowment direct support:  
Capital $ 5,000,000 $ -
Building, structures and grounds 330,785 307,914
General operations 11,754 5,101
Lectureship and CLSC 636,191 616,578
Performing arts 559,418 564,054
Religion 196,056 188,947
Scholarship and youth 272,381 270,637
$ 7,006,585 $ 1,953,231

Support from other funds:  
Capital $ 800,018 $ 29,166
General operations 141,733 74,047
Lectureship and CLSC 41,882 52,672
Performing arts - 25,000
Religion 80,012 26,626
Scholarship and youth 5,308 8,440
$ 1,068,953 $ 215,951

Development:  
Salaries and benefits $ 906,201 $ 872,862
Promotion and communications 89,411 148,990
Office 44,517 32,276
Travel and hospitality 141,219 176,996
Professional and consulting 52,472 58,750
Equipment maintenance and repairs 20,250 25,822
Education 8,337 6,117
Reimbursement by the Institution (350,000) (350,000)
$ 912,407 $ 971,813

General and administrative:  
Investment management $ 430,654 $ 419,869
Salaries and benefits 245,753 234,825
Office 12,926 12,160
Travel and hospitality 49,216 38,042
Professional and consulting 40,260 40,065
Equipment maintenance and repairs 22,132 18,607
Education 3,557 2,242
$ 804,498 $ 765,810

Total expenses $ 13,499,769 $ 7,881,064
New funds are designated in orange.

Paul M. Alexander Fund *
Dorothy L. Anderson Endowment for Chautauqua *
Mary Apple Fund *
Arthur S. & Barbara F. Banner Endowment for Chautauqua
Robert and Je’Anne Bargar Endowment
Zoe and Ken Barley Endowment
Beatrice B. Bates Fund
Julia M. Bates Fund *
Nancy and Dick Bechtolt Fund
Thomas and Jane Becker Endowment
Bemus Fund for Chautauqua
Gordon Benn Fund
Alan J. and Mary Hough Blair Fund
Cora M. Blair Fund *
The Erika Block Fund for Chautauqua *
Martha Borowsky Endowment Fund
Bosland Family Fund
Boyle Family Fund
Barbara A. and Patrick James Brady III Endowment for Chautauqua
Sara E. Bradley Endowment for Chautauqua
Barbara and William Branch Fund
Daniel and Wanita Bratton Endowment
Lillian Brink Endowment Fund
Gary M. and Willow R. Brost Endowment for Chautauqua
Henrietta T. Campbell Fund
Maxine M. Carleton Fund
Katharine J. Carnahan Endowment
Barbara P. and Howard E. Chadwick Fund
Genevieve Cheney 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
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
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
Heber R. Harper Fund
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
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
The Lemonade Fund
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
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 *
Bert W. and Joanne R. Simons Endowment
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
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
New funds are designated in orange.

PHYSICAL MAINTENANCE FUNDS
$7,911,571 Assets
$325,539 Support to the Institution

Buildings and Structures
$6,490,812 Assets
$267,043 Support to the Institution

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

Specific Gardens and Parks
$946,735 Assets
$38,444 Support to the Institution

The Reid B. Babcox Memorial Garden Terrace Endowment
The Bell/Ritts Garden Fund
Arline and Ralph Bernstein Memorial Rain Garden Fund
Selina W. Braham Memorial Garden Fund
Judge W. Walter Braham Garden Fund
Dr. Daniel and Wanita Bratton Garden Fund
The Henrietta T. Campbell Garden Fund
Carnahan-Jackson Memorial Garden Fund
The Carothers Family Garden Fund
The Kirk David Casto Memorial Garden Fund
Jean Chadwick Memorial Garden Fund
The CLSC Class of 1982 Helen W. Giacobine Garden Fund
Connolly Family Gardens and Fountains Endowment
The Cornell Garden Fund
DeeDee’s Garden Endowment
The Ehrenreich Family Fund
The Fausnaugh Family Garden Fund
Peggy Foley Memorial Garden Fund
The Jean Rice Goodell Garden Fund
The Robert Y. Gromet Family Garden Fund
The Mary Kimball Haker Memorial Garden Endowment Fund
The Eleanor McKnight Haupt Fund
The Holden Garden Fund
Patricia K. Ives Memorial Beautification Fund
Melvin Johnson Sculpture Garden Endowment
Henrietta Ord Jones Memorial Fund
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
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 Serman Memorial Garden
The Stephen Toms Garden Fund
Randall E. Widrig Memorial Garden Fund
The Dr. Alan Winklestein 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
$474,024 Assets
$20,052 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
$11,143,233 Assets
$452,856 Support to the Institution

Lectureships
$8,245,910 Assets
$339,299 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
The Dr. Robert R. Hesse Lectureship
The Higie Family Lectureship
The Robert Jacobs Memorial Lectureship Fund
Richard W. and Jeanette 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
The Frank G. Sterritte Memorial 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
$1,277,610 Assets
$54,997 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
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<td>C.L.S.C. Class of 1948 Endowment Fund</td>
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<tr>
<td>Court Family Endowment for the Literary Arts</td>
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<td>The Louise Shaw Van Kirk Dill Fund</td>
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<td>The Paul and Mary Jean Irion Endowment</td>
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<td>The Mary Anne and John Morefield Endowment for the Enhancement of Poetry</td>
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<td>The Bess Sheppard Morrison CLSC Fund</td>
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<td>William A. Morrow Fund</td>
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<td>Gail Anne Clement Olson Fund</td>
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<td>The Martha and Scott Reading Fund</td>
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<td>Grace Tongren Ross Fund for Smith Memorial Library</td>
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<td>Smith Memorial Library Fund</td>
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<td><strong>Youth Activities</strong></td>
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<tr>
<td><strong>$537,221 Assets</strong></td>
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<td><strong>$23,664 Support to the Institution</strong></td>
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<td>Ward T. Bower Youth Activities Memorial</td>
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<td>Elizabeth Elser Doolittle Fund for Youth</td>
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<td>The Gelb Family Endowment Fund</td>
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<td>Gelb Family Fund</td>
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<tr>
<td>Cyril T. M. Hough and Lt. C. Randall Hough, USMC Memorial Fund</td>
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<tr>
<td>The Katie Howard Memorial Fund</td>
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<tr>
<td>Julius A. and Carol L. Nicolai Boys' and Girls' Club Endowment</td>
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<td>The Popp Family Fund</td>
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<td>Paul L. Sample Memorial Fund</td>
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<tr>
<td>Andrew and Donna Sorensen Youth Activities Center Endowment</td>
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<td>The Laurence and Maria Wagner Family Fund</td>
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<td>Youth Activities Fund</td>
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<tr>
<td><strong>$1,082,492 Assets</strong></td>
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<td><strong>$34,896 Support to the Institution</strong></td>
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<td>Lillian Brink Education Fund</td>
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<td>Emily and Richard Smucker Directorship for Education</td>
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<td><strong>FINE &amp; PERFORMING ARTS FUNDS</strong></td>
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<td><strong>$13,522,240 Assets</strong></td>
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<td><strong>$559,342 Support to the Institution</strong></td>
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<td><strong>General</strong></td>
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<td><strong>$2,656,728 Assets</strong></td>
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<td><strong>$111,728 Support to the Institution</strong></td>
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<td>The John T. and Katherine G. Bailey Family Fund</td>
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<td>The Boyle Family Fund for the Performing Arts</td>
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<td>Emily McKnight Corry Endowment for the Performing Arts</td>
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<td>The Barbara Baldwin DeFrees Fund for the Performing Arts</td>
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<td>The Edith B. and Arthur E. Earley Fund for the Performing Arts</td>
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<td>The Endowment Fund for the Performing Arts</td>
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<td>John Alfred and Oscar Johnson Memorial Trust</td>
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<td>The Lenna Fund for the Performing Arts</td>
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<td>The Helen Cooper Mercer Fund for Performing Arts</td>
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<td>National Endowment for the Arts Fund</td>
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<td>The Rittman Family Fund for Performing Arts</td>
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<td>The Julia and Ralph C. Sheldon, Jr. Fund for the Performing Arts</td>
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<td><strong>Opera</strong></td>
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<td><strong>$3,871,128 Assets</strong></td>
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<td><strong>$153,749 Support to the Institution</strong></td>
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<td>A. Chace &amp; Josephine B. Anderson Opera Endowment Fund</td>
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<td>John E. Anderson Opera Endowment</td>
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<td>The Peggy and Andy Anderson Family Fund</td>
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<tr>
<td>The Cynthia Auerbach Fund for Opera</td>
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<tr>
<td>Bemus Endowment for Opera</td>
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<td>Anne and John Burden Opera Fund</td>
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<td>Chautauqua Opera Endowment Fund</td>
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<td>The Chautauqua Opera Guild Endowment</td>
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<td>The Connolly Family Fund For Opera</td>
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<tr>
<td>The John A. and Emily McKnight Corry Opera Fund</td>
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<td>The Barbara Baldwin DeFrees Opera Fund</td>
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<td>The Walter F. Ferchen Opera Fund</td>
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<td>The Eleanor B. Franks Fund for the Opera</td>
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<td>The James and Elisabeth Groninger Fund for Opera</td>
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<td>The Jane A. Gross Opera Endowment</td>
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<td>The Kay Frantz Israel Fund for Opera</td>
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<td>The Mildred Lesenger Fund for Opera</td>
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<td>The Kay H. Logan Opera Fund</td>
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<td>The Annette Pickens Malvin Memorial Fund</td>
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<td>The Christopher and Susan Martin Opera Fund</td>
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<td>The Margaret Clark Mercer Fund for Opera</td>
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<td>The Ralph E. Miller and Paul E. Cavein Fund</td>
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<td>The Reverend Lloyd V. Moffett Opera Endowment Fund</td>
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<td>The Robert G. and Lilian Vitanza Ney Family Opera Fund</td>
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<td>The Joseph A. and Anne T. Prezio Opera Endowment Fund</td>
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<td>The Richards Family Opera Fund</td>
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<td>The Molly Rinehart Fund for Opera</td>
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<td>The Wadsworth Fund</td>
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<td>Charles Weaver and Family Fund for Opera</td>
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<td>Dr. Fred R. Whaley and Helen A. Whaley Fund</td>
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<td>The Robert and Virginia Young Opera Fund</td>
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<tr>
<td><strong>Symphony</strong></td>
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<tr>
<td>$159,774 <strong>Support to the Institution</strong></td>
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<tr>
<td>Clement and Karen Arrison Endowment for Classical Violin</td>
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<tr>
<td>Maggie Bella Symphony Orchestra Endowment Fund</td>
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<td>The Boyle Family Fund for the Chautauqua Symphony Orchestra</td>
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<td>The Mary Peterson Chalfant Fund for the Chautauqua Symphony Orchestra</td>
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<td>Chautauqua Symphony Orchestra Endowment Fund</td>
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<td>The Carl and Lee Chaverin Fund</td>
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<tr>
<td>Shirley A. and Arthur R. Duffy Endowment for Classical Guitar</td>
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<tr>
<td>William D. Kuhns Fund for General Music Purposes of Chautauqua Institution</td>
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<td>The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra</td>
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<td>Helen T. Logan Fund for the Chautauqua Symphony Orchestra</td>
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<td>Mr. &amp; Mrs. Sam A. Miller and Mr. &amp; Mrs. Edward S. Babcox Memorial Fund</td>
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<tr>
<td>The Mischakoff/Taylor Concertmaster Chair Fund</td>
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<td>Margaret Miller Newman Fund for the Chautauqua Symphony Orchestra</td>
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<td>The David B. and Barbara Barrett Orr Music Fund</td>
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<td>The Reinberger Fund for the Performing Arts</td>
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<td>The Gertrude Aldredge Shelburne Fund</td>
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<td>The Dr. James and Mary Anne Evans Singleton Fund for the Chautauqua Symphony Orchestra</td>
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<td>Symphony Patron Endowment Fund for the Chautauqua Symphony Orchestra</td>
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<td>The Trustees’ Fund for the Chautauqua Symphony Orchestra</td>
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<td>Mary E. Whitaker Symphony Endowment Fund</td>
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<td>The Wilder Family Fund for the Chautauqua Symphony Orchestra</td>
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<td>Nora J. Williams Symphony Fund</td>
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<td>Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra</td>
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<thead>
<tr>
<th><strong>Dance</strong></th>
<th><strong>$1,106,911 Assets</strong></th>
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<tr>
<td>$47,647 <strong>Support to the Institution</strong></td>
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<tr>
<td>The Paul and Toni Branch Fund for Dance</td>
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<tr>
<td>Carnahan-Jackson Dance Chair Endowment</td>
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<td>The Carnahan-Jackson Dance Endowment</td>
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<td>Dakin Family Fund for Dance</td>
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<td>Terrie Vaile Hauck Dance Endowment Fund</td>
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<th><strong>Visual Arts</strong></th>
<th><strong>$1,644,566 Assets</strong></th>
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<td>$67,954 <strong>Support to the Institution</strong></td>
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<tr>
<td>Je’Anne Griffin Bargar Endowment for Visual Arts</td>
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<td>The Chautauqua Art Association, Inc. Visual Arts Fund</td>
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<td>Shirley Mix Flynn Visual Arts Endowment</td>
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<td>Chip and Gail Gamble Visual Arts Endowment</td>
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<td>Joan and David Lincoln Ceramics Endowment</td>
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<td>Florence H. Norton and Cynthia Norton Visual Arts Endowment</td>
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<td>Susan and John Turben Director of the VACI Galleries Endowment</td>
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**RELIGION FUNDS**

| **$4,877,463 Assets** |
| $198,364 **Support to the Institution** |

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<th><strong>General</strong></th>
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<td>Eleanor B. Daugherty Fund</td>
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<td>Department of Religion Fund</td>
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<td>Department of Religion Leadership Fund</td>
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<td>Carrell Leiper Hall Memorial Fund in Honor of Dr. Henry Smith Leiper</td>
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<td>Lois Raynow Department of Religion Fund</td>
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<th><strong>Chaplaincies</strong></th>
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<td>Marie Reid-Edward Spencer Babcox Memorial Fund</td>
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<td>Gladys R. Brasted and Adair Brasted Gould Memorial Chaplaincy</td>
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<td>Robert D. Campbell Memorial Chaplaincy</td>
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<tr>
<td>Daney-Holden Chaplaincy Fund</td>
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<td>The Mr. and Mrs. William Uhler Follansbee Memorial Chaplaincy</td>
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<td>J. Everett Hall Memorial Chaplaincy</td>
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<tr>
<td>Samuel M. and Mary E. Hazlett Memorial Fund</td>
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</table>
ENDOWMENT FUNDS (CONT.)

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

Religious Initiatives Fund
The Ann Simpson Rice Flower Fund
The Allen Steere, Sr. Fund for the Department of Religion

Lectureships
$1,223,270 Assets
$53,872 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
$1,413,417 Assets
$51,978 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 Cambell Department of Religion Endowment Fund
The Chautauqua Fund for Sacred Music
The Chautauqua Art Scholarship
The Chautauqua Golf Club Scholarship Fund
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

SCHOLARSHIP FUNDS
$6,011,751 Assets
$253,459 Support to the Institution

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
Bonnefous/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
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 Michael and Jane Eisner Dance Scholarship
Mary Cummings Paine Eudy Scholarship
The Falk Scholarship Fund
Family Scholarship Endowment
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
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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 Gröff-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 Higby School of Dance Scholarship
William and Pauline Higby 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
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The Chautauqua Boys’ and Girls’ Club has been at the heart of youth programming at Chautauqua since 1893. Not only has it been entertaining and educating Chautauqua’s children for over 120 years, but it has created a safe place where children can grow into their independence at an early age and learn the beauty and benefit of recreation beyond competitive sports. Club is also where life-long bonds begin and best friends are made. There is no denying that Club provides a special experience for the thousands of youth that visit Chautauqua each summer.

Jack and Yvonne McCredie know this well. From their cottage on the south end of the grounds, perched above the tennis courts and a stone’s throw from Club, they observe the daily buzz of activity as children ride their bikes to and from the waterfront. Jack participated in Club in his youth as did Jack and Yvonne’s children. Now their grandchildren share in the Club experience.

Eyewitness to the impact of Club for more than seventy years, Jack and Yvonne initiated discussions that led to their decision to endow the director position at Boys’ and Girls’ Club, currently held by Greg “Coach” Prechtl. This gift to the Promise Campaign is being funded under the new favorable conditions approved by Congress last year for distributions from their IRA.

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Brian and Star Ulasewicz
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Fred Zirm and Robin Lewis
The Foundation gratefully acknowledges endowment contributions made in memory of the following:

Helene Altschuler
Jack G. Armstrong
Ruth B. Bailey
William T. Becker
Richard M. (Rick) Brown
Stephen C. Brown
Patricia Coghlan
Theodore R. Colborn
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The Foundation gratefully acknowledges endowment contributions made in honor of the following:

Marguerite Allen
Judy Austin
Jim and Johnette Barnes
Gaylyn Bell
Harvey and Bayla Biskin
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Lawrence Newman
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Rick Redington
Susan F. and Arthur N. Sample, III
Howard and Barbara Schiller
William Scollard and Kuniko Washio
Walter C. Shaw III
Ann Slonaker
Tucker Smathers
Jimmy and Karen Stevens
Jason and Nancy Weintraub
There is a new landmark on the grounds of Chautauqua — Timothy's Playground — where at any given moment there is likely to be a gaggle of children laughing and parents enjoying this space where families can come together and play. This place also holds the spirit of a Chautauquan taken far too soon. Timothy Ritacco, the first-born son of Mark Ritacco and Ann Ayers, died in 2004 of Sandhoff’s disease at just sixteen months of age.

Enter a group of Mark's and Ann's friends from the Chautauqua Boys' and Girls' Club, where Mark was a grouper and Ann and Mark were both counselors. Every summer, for the past 11 years, they have gathered one Saturday morning at Club to play basketball and kickball, sell lemonade and snacks, and raise money to build a playground in Timothy's memory.

The playground was officially dedicated this past summer. As Ann and Mark reflected on it they remarked, “Timothy's playground stands as a symbol of the kind of friendships that can love you through the hardest of times, and create the best of times for you to smile back on. This isn't just Timothy's legacy; it is Chautauqua's legacy. Our children and our friends' children have played kickball and basketball, and bought lemonade and snacks over the years. They have made donations. Timothy's Playground is their playground. It's an incredible experience for us and them to see their hard work — and hard play — become reality.”

The space is filled with natural wood structures including a racecar, climbing tunnel, benches and a table and chairs, all carved lovingly by a member of the Institution staff. The wood for those structures comes from trees cut down near the Amphitheater and in Miller Park. Stepping stumps and a balance beam set were also created from Institution trees that have now found a new life.

Recognizing the importance of sustaining this special new addition to Chautauqua’s landscape, Timothy’s Playground Endowment has been established for the future care and maintenance of the playground.

Timothy's playground is dedicated to his memory and stands today as a symbol of what it means for a community to come together and give new life and lasting laughter to those we love.
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 members are highlighted in orange.

Anonymous (16)

W. Andrew Achenbaum
Joan B. Alexander
Dr. Robert K. Alico
Caroline Thompson and Steve Allen
Joanne and Henry Altland
John E. Anderson
John and Diane Arch
Sherry and Jim Babcock
James M. Bailey
Mr. and Mrs. John T. Bailey
Drs. Arthur and Barbara Banner
Robert and Mary Bargar
Constance Barton
William E. and LaDonna G. Bates
Bob and Joan Battaglin
Robert W. and Janet W. Baum
Nancy Bechtolt
Ann C. Beebe
Mary and Charles Begerow
Jill and Arnie Bellowe
Christina Bemu
Alice Benedict
Stephen and Edith Benson
Bobbi and Donald Bernstein
Caroline Van Kirk Bissell
Mary Blair
Robert and Jean Boell
Cathy Bonner
June Bonyor
Diana and David Bower
Loretta Bower
Ted Ash and Mary Boyle
F. James and Barbara Brady
Kathy and James Braham
Barbara and Twig Branch
Sharon and David Britton
Margaret and William Brockman
Steven and Cynthia Brown
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
Christine and Ken Caro
Susan Cartney
Jean Cheney
Carol and Jim Chimento
Molly Rinehart and Charles Christian
Geoff and Kathy Church
Marilyn and Sebastian Ciancio
Hon. and Mrs. Bill Clinger
Joan R. Clouse
John and Bette Cochran
Helen B. Cochrane
Wendell and Ruth Gerrard Cole
Dorothy Comfort
Jack Connolly
Ira B. Cooperman
Dr. and Mrs. R. William Cornell
John Corry
Dr. Ellis and Bettsy Cowling
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Courtney Curatolo
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Cynthia Norton and Eagle Eagle
David and Miriam Y. Eddleman
Rivona Ehrenreich
Stuart and Jan Eisler
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Norma Ferguson
Rita Van Wie Finger
Jennifer and Rich Flanagan
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Shirley A. Flynn
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Zetta Fradon
Joanne Fuller
Lois T. Galloway
Louise Fansley Gardner
Edward and Patsy Garland
vic and Joan Gelb
Marc Geller
Barbara and Peter Georgescu
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Cheryl S. and Carl W. Huber, Jr.
Pat and Jay Hudson
Gale H. Hurst
Don and Mary Hustead
Robert and Joy Ingersoll
### Directors and Term Expires

<table>
<thead>
<tr>
<th>Name</th>
<th>Term Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td>David W. Anderson of Hingham, Massachusetts</td>
<td>2019</td>
</tr>
<tr>
<td>John E. Anderson of Lakewood, New York</td>
<td>2016</td>
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<tr>
<td>Thomas M. Becker of Lakewood, New York</td>
<td>ii</td>
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<tr>
<td>Cathy Bonner of Austin, Texas - ex officio</td>
<td>2017</td>
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<tr>
<td>P. James Brady of Johns Creek, Georgia</td>
<td>2018(^i)</td>
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<tr>
<td>John S. Connolly, Jr. of Boynton Beach, Florida</td>
<td>2016</td>
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<tr>
<td>Andrew L. Camden of Grosse Pointe, Michigan</td>
<td>2017</td>
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<tr>
<td>William M. James of New York, New York</td>
<td>2016</td>
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<tr>
<td>John S. Kobacker of Gahanna, Ohio</td>
<td>2019</td>
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<tr>
<td>Susan Moran Murphy of Bloomfield Hills, Michigan</td>
<td>2018</td>
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<tr>
<td>Anne Odland of Washington, D.C.</td>
<td>2018</td>
</tr>
<tr>
<td>George T. Snyder of Pittsburgh, Pennsylvania</td>
<td>2017</td>
</tr>
<tr>
<td>Stephen J. Zenczak of Gates Mills, Ohio</td>
<td>2019</td>
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</tbody>
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\(^i\)Coincides with term on the Chautauqua Institution’s Board of Trustees

\(^{ii}\)Coincides with term as President of Chautauqua Institution

### Officers

- **Cathy Bonner** • Chair
- **William M. James** • Vice Chair
- **John S. Connolly, Jr.** • Vice Chair
- **George L. Follansbee, Jr.** • Chief Executive Officer
- **Deborah E. Moore**, CPA • Treasurer & Chief Financial Officer
- **Linda Jordan Loomis** • Corporate Secretary

### Staff

- **Nikki M. Adams** • Administrative Project Manager
- **Joshua C. Auflick** • Research Associate
- **Chris J. Baglia** • Gift Administrator
- **Karen Blozie** • Senior Major Gifts Officer
- **Jacqueline A. Chagnon** • Director of Stewardship & Donor Relations
- **Jill Cummiskey** • Assistant Director of the Chautauqua Fund
- **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
- **Dustin Nelson** • Director of Gift Planning
- **Megan E. Sorenson** • Associate Director of the Chautauqua Fund & Communications Manager
- **Nicole K. Szydlo** • Senior Researcher & Coordinator of Information Strategy
**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  
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Samuel M. Hazlett • August 1937 to July 1956  
James H. Matthews • August 1937 to 1939  
Walter Roberts • August 1937 to March 1959  
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Mrs. Dorothy Smith • August 1943 to 1950  
Walter Roberts • 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 Amr • 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. Fausnauge • 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  
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  
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

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**Former Board Leadership**

Walter Roberts  
August 1937 to August 1957  
Harold F. Reed  
August 1957 to August 1967  
John D. Hamilton  
August 1967 to August 1971  
Richard H. Miller  
August 1971 to August 1996  
William F. Hill, II  
August 1996 to August 2002  
Lowell K. Strohl  
August 2002 to August 2008  
Steven W. Percy  
August 2008 to August 2015