



CHAUTAUQUA FOUNDATION

2017
ANNUAL
REPORT

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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.

MESSAGE FROM LEADERSHIP



Dear friends,

We all get very wrapped up in the here and now and moving onto the next “big thing.” As we write this letter for the annual report during week seven of the 2017 season, we reflect on the affairs of the Foundation from April 1, 2016 to March 31, 2017 — the Foundation’s most recently



completed fiscal year. We hope you will share our view that much was accomplished, indeed many “big things” were accomplished for which we are grateful.

When the fiscal year began, only the most preliminary work had begun on the Amphitheater project, work that was halted for ten weeks

during the 2016 season. The Foundation is proud of its role in facilitating this project both through providing bridge financing until pledge payments from donors are received and making available, as needed, unrestricted assets of the Foundation received from past philanthropy.

The Institution is the sole beneficiary of the Foundation and the directors embraced the Amphitheater project as critical to our beneficiary’s well-being. Having celebrated its opening on July 2, 2017 and witnessing it come to life this season, we share with all of you the excitement about the renewal of this space and what the Amphitheater means for the Institution’s and our community’s future.

Three-quarters of the way through the recent fiscal

year brought to a close the Promise Campaign on December 31, 2016 with its stunning achievement of \$103,500,000 raised in support of the objectives established by the Institution’s Board of Trustees in its 2010 strategic plan. This successful campaign concluded just nine years after the end of the Idea Campaign which raised \$53 million. The Promise Campaign featured Chautauqua’s first gift of eight figures and between the Institution and the Foundation together, Chautauqua received seventeen (17) gifts of \$1 million or more. Comparatively, the Foundation and Institution received seven (7) gifts of \$1 million or more in the Idea Campaign.

In the last year of the Promise Campaign we were able



LEADERSHIP

Staff and Faculty Chairs

\$2,500,000 goal
\$2,000,000 raised
4 donors



THE GROUNDS

Endowment for Public Spaces

\$1,250,000 goal
\$2,272,033 raised
100 donors

Initiatives for the Environment

\$4,500,000 goal
\$4,641,068 raised
176 donors

Facility Improvements

\$500,000 goal
\$948,000 raised
14 donors



KEEPING THE PROMISE

Unspecified Endowment

\$15,650,000 goal
\$11,795,548 raised
590 donors

Chautauqua Fund

\$22,000,000 goal
\$22,014,196 raised
5,868 donors

to increase the number of donors to the Chautauqua Fund over the prior year, stemming a five-year period of declining numbers in the Chautauqua Fund. Yet, in this past year — as in each year of the Campaign — the overall amount donated for annual support increased and the Promise Campaign objective of \$22,000,000 of annual giving over these six years was exceeded.

When this fiscal year began, Tom Becker was in his final year as president of the Institution. We ended it with Michael Hill in that office. In addition, the Foundation had four members of its board serve on the presidential search committee. The Foundation was deeply involved in a series of events to honor Tom and Jane

Becker for their many years of service to the community and oversaw the creation of an endowment fund bearing their name in the amount of \$1.8 million to support programs in the Chautauqua Amphitheater. The Foundation also oversaw the introduction of Michael to Chautauquans with fourteen events hosted in seven states and Washington D.C.

When the year began, we were coming off disappointing investment results for fiscal year '16. As you can read in this report, FY '17 was a strong year and our willingness to be patient through the underperformance was rewarded. Two other data points of interest are that our spending from the Foundation equaled 5.4% of the opening market value of the

endowment and that our cost of fundraising over the course of the Promise Campaign equaled 6.9 cents on each dollar raised. The latter is an industry leading result.

Finally, in the course of this fiscal year, we welcomed four new directors to the board replacing directors who chose to retire. Georgia Court and Dick Wade began four year terms and John Milos was appointed to one of the two slots on the Board required under the bylaws to be filled by a trustee of the Institution. Michael Hill became a director by reason of his position as president. With gratitude, we bade farewell to John Anderson, John Kobacker, Gary Brost, Jim Brady and Tom Becker for their Foundation board service.

We are excited about the new perspectives being brought to the Foundation's work and we are grateful for the many contributions made by those who left the board.

And speaking of gratitude, we remain grateful to all Chautauquans who give of themselves to ensure that the on-going promise of Chautauqua is kept. Thank you.

Sincerely,
Cathy Bonner
Cathy Bonner,
Chair, Board of Directors

Geoff Hollansbee
Geoff Hollansbee,
Chief Executive Officer



THE EXPERIENCE

TOTAL

Bellinger Hall

\$5,500,000 goal
\$56,200 raised
4 donors

Endowed Scholarships

\$2,000,000 goal
\$2,362,059 raised
302 donors

Hagen Wensley House

\$2,800,000 goal
\$2,868,981 raised
3 donors

Amphitheater

\$33,500,000 goal
\$39,873,831 raised
220 donors

Program Enhancement and Innovation

\$8,000,000 goal
\$14,646,746 raised
984 donors

Promise Campaign

\$98,200,000 goal
\$103,478,662 raised
6,965 unique supporters

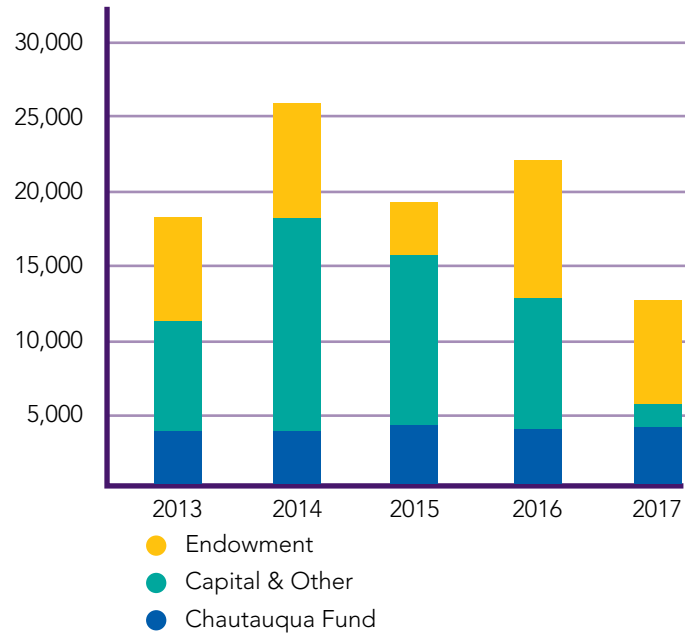
FUNDRAISING REPORT

Total Philanthropic Activity

In this past fiscal year, Chautauquans have generously supported Chautauqua Institution with over \$12 million in total philanthropy which includes pledges, outright gifts and planned gifts.

The information below is based on fiscal years ended on March 31.

Fiscal	Chautauqua Fund	Endowment	Capital & Other	Total	Donors
2017	\$ 3,838,586	\$ 7,028,438	\$ 1,554,555	\$ 12,421,579	3,180
2016	3,707,326	9,326,210	8,834,104	21,867,640	2,973
2015	3,974,259	3,545,650	11,489,663	19,009,572	2,873
2014	3,563,728	7,816,690	14,356,124	25,736,542	2,952
2013	3,514,364	7,054,029	7,469,254	18,037,647	3,185



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 38–42.

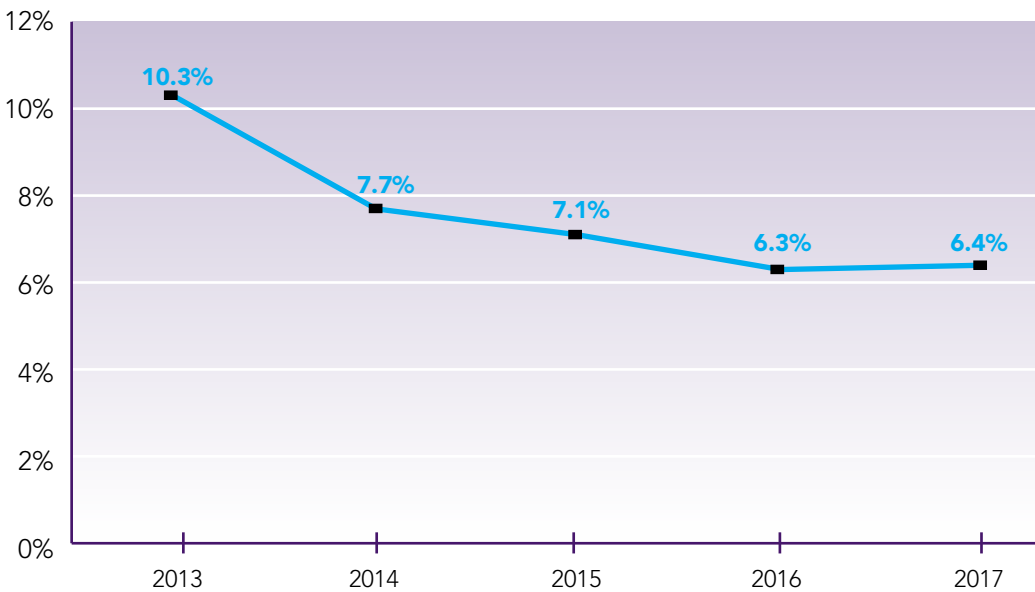
Capital & Other

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*.

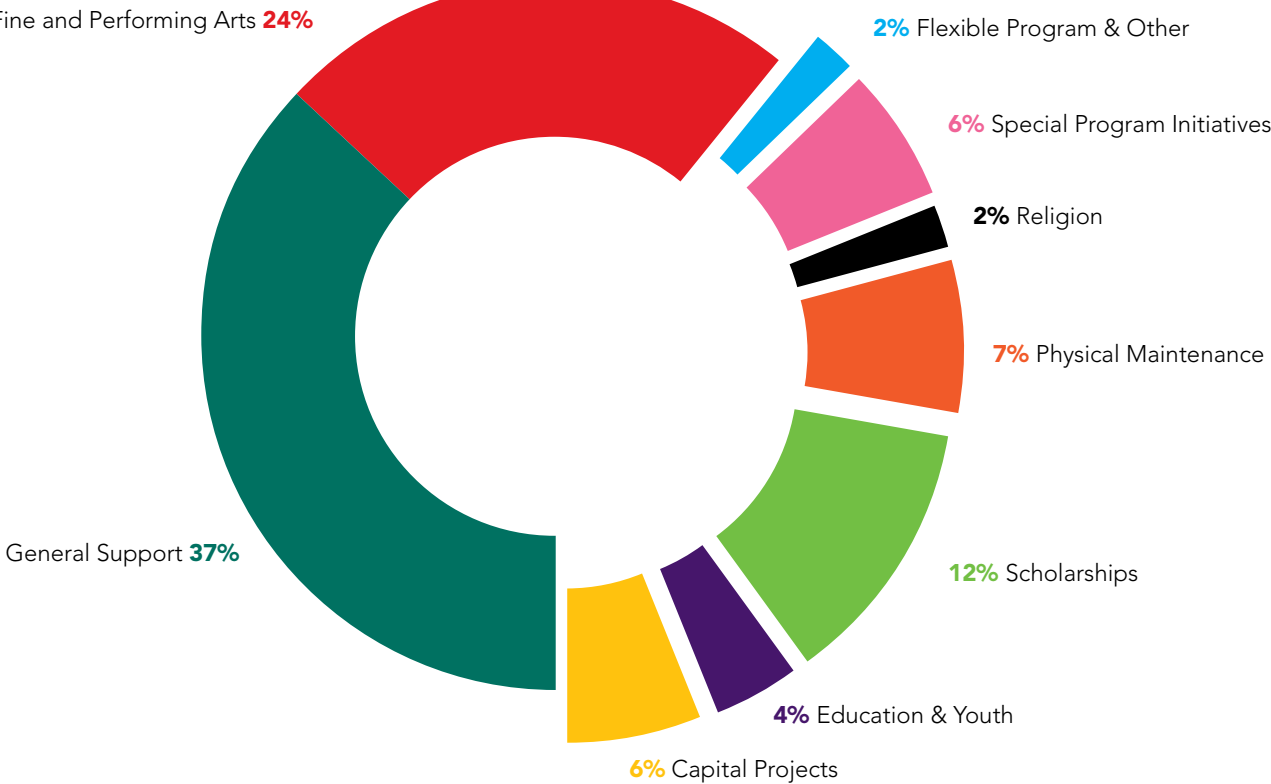
Five-Year Average Cost of Fundraising

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 10.3% to 6.4% over the past 5 years.



Total Giving by Area of Support

This chart represents total philanthropy of \$12.4 million for the fiscal year ended March 31, 2017 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

Emily and John Corry
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
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 Bromeley
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
Jesse and Cathy 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
Kathy and James Braham
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
Court Family Foundation
Fund of the Gulf Coast
Community Foundation
Eleanor B. Daugherty
Mr. and Mrs. Joseph H. DeFrees
Charles Edison Fund
Mr. and Mrs. Hal A. Fausnaugh
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. McCredie, Jr.
Bruce W. and Sarah Hagen
McWilliams
Robert and Sally Metzgar
Mr. and Mrs. John A. Milos
George E. and Susan Moran
Murphy
Ralph H. and Elizabeth C. Norton Philanthropic Trust
Steve and Anne Odland
Office Depot Foundation, Inc.
Sheila Penrose and Ernest Mahaffey
Miriam S. Reading and Richard H. Miller
Larry and Bonnye Roose
Mr. and Mrs. H. Parker Sharp
Mr. and Mrs. J. Bruce Stromgren
Mr. and Mrs. Henry B. Suhr, Jr.
Robert and Joyce Tate
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

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
Kevin and Karen Crowder
Mr. and Mrs. John R. Cummings
The Jessie Smith Darrah Fund
Richard and Marty Davis
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. 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
William M. Kinley
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.
Cornelia Chason Miller
Ministrare, Inc.
Miss Jane C. Morgan
Mr. and Mrs. Lewis W. Morgan

National Endowment for the Arts
 The John R. Oishei Foundation
 The Estate of Gail Clement Olson
 Robert A. Ott, Jr.
 Mary and Jim Pardo
 Mr. and Mrs. William H. Park
 Deloras Pemberton
 Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
 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.
 Susan and John Turben Foundation
 VACI Partners
 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
 Shirley and Sam Zemsky
 Steve Zenczak and Pat Feighan



Every Gift Matters

JANE AND TOM BECKER ENDOWMENT FOR AMPHITHEATER PROGRAMS

When Tom Becker announced that he would retire at the conclusion of 2016, Chautauqua's leadership committed themselves to honoring Tom and Jane's thirty-two years of service to the Foundation and Institution. Announced in October 2016 and backed with the generous support from the community, an endowment fund in their honor garnered commitments of \$1.8 million. In honoring Tom and Jane Becker, a lead group of over fifty Chautauquans ensured that the contributions Jane and Tom made to the programmatic quality of the Institution will continue to be felt in the years to come.

The Jane and Tom Becker Endowment for Amphitheater Programs will underwrite lectures, performances or events taking place in the Amphitheater, providing enjoyment and inspiration for current and future audiences of Chautauquans. Additionally, the multi-purpose room on the third floor of the Susan Hirt Hagen Center at the Chautauqua Amphitheater has been named the Tom and Jane Becker Room. The room, with its stunning view of Chautauqua Lake, serves as the rehearsal room for the Motet Choir and will serve many Institution and community groups from the grounds and region for meetings and receptions.

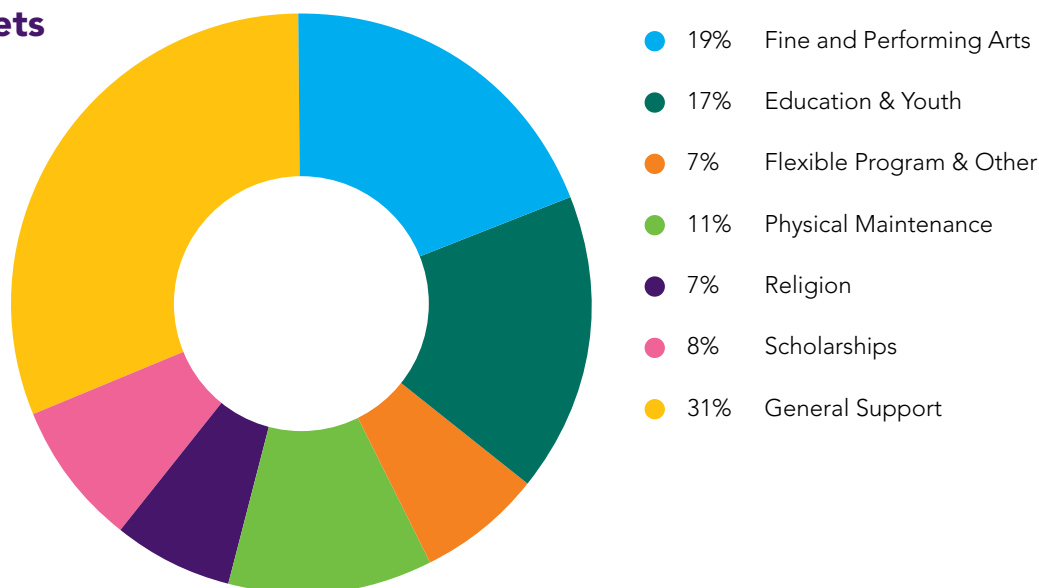
Financial Overview

Net assets of the Foundation increased by more than \$9 million in the fiscal year ended March 31, 2017 to \$88.4 million and total assets reached \$91.8 million. The total number of active endowment funds surpassed 700, the combined total of conditional and unconditional endowment contributions receivable increased by nearly \$2 million, and the investment portfolio produced a gain of 11.2%.

Indeed it was a positive year financially for the Foundation. The challenge remains the same as so many other organizations are facing, which is how to maintain spending rates in such a low return market environment. The Finance and Investment Committees of the Foundation continue to meet jointly to deliver the maximum amount possible while being responsible to the long-term sustainability of the Foundation and the Institution.

Endowment Net Assets

The net asset balance of the 714 active endowment funds as of March 31, 2017 was \$80.2 million. This balance represents the sum total of each endowment fund as of March 31, 2017. 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, 2017 by area of support.



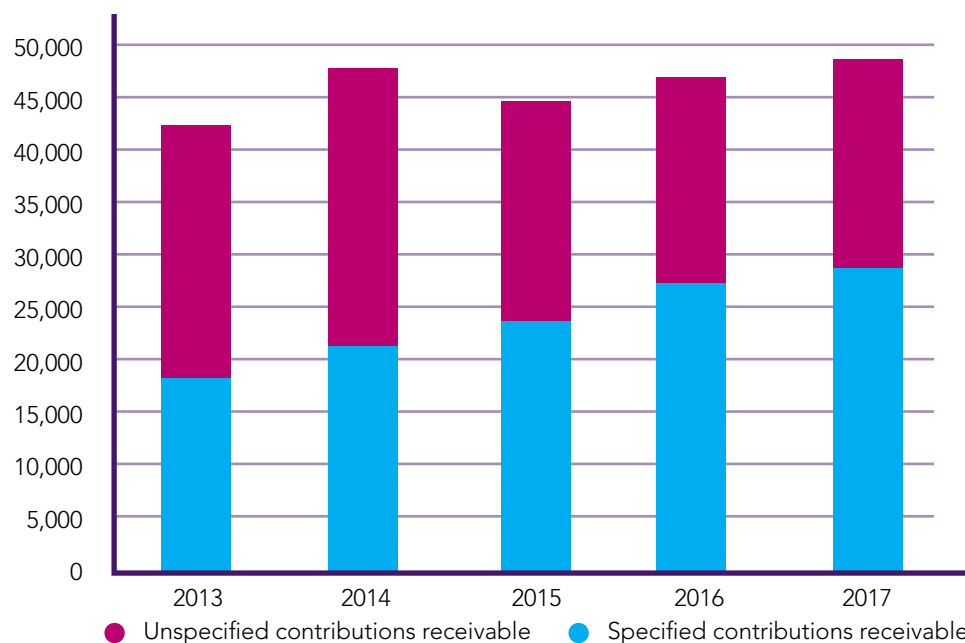
Support to the Institution

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.

	fiscal year 3/31/17	fiscal year 3/31/16
Direct Support to the Institution		
Support from Endowment	\$ 2,031,962	\$ 7,006,585
Support from Temporarily Restricted Funds	162,705	1,068,953
Annual Support from the Chautauqua Fund	3,838,586	3,707,326
	\$ 6,033,253	\$ 11,782,864
Indirect Support to the Institution		
Development Expense	\$ 1,342,908	\$ 1,262,407
Reimbursement by the Institution	(350,000)	(350,000)
	\$ 992,908	\$ 912,407

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 \$49.2 million as of March 31, 2017. The discounted value of unconditional contributions receivable recorded in the financial statements was \$5 million as of March 31, 2017. 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 44 and 45.



The chart above depicts gross endowment contributions receivable in thousands.

March 31, 2017

	Specified	Unspecified	Total
Unconditional contributions receivable	\$ 2,537,932	\$ 9,026,357	\$ 11,564,289
Conditional contributions receivable	26,620,251	11,070,952	37,691,203
	<u>\$ 29,158,183</u>	<u>\$ 20,097,309</u>	<u>\$ 49,255,492</u>

Unconditional contributions receivable as of March 31, 2017

	Gross	Discount	Net
Pooled Life Income Fund	\$ 3,396,010	\$ 1,757,400	\$ 1,638,610
Irrevocable Trusts	6,671,992	4,647,120	2,024,872
Cash Pledges	1,496,287	133,423	1,362,864
	<u>\$ 11,564,289</u>	<u>\$ 6,537,943</u>	<u>\$ 5,026,346</u>

Conditional contributions receivable as of March 31, 2017

Bequests	\$ 21,227,040
Retirement Plans	7,499,227
Life Insurance	644,939
Revocable Trusts	8,319,997
	<u>\$ 37,691,203</u>

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 \$87 million in invested assets, comprised of the following portfolios:

- 1) Endowment (\$81.8 million)
- 2) Temporarily restricted (\$1.5 million)
- 3) Pooled life income fund (\$3.4 million)
- 4) Custodial (\$0.3 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.

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 \$63.7 million of the endowment and \$18.1 million of the endowment is invested in the two funds of hedge funds.

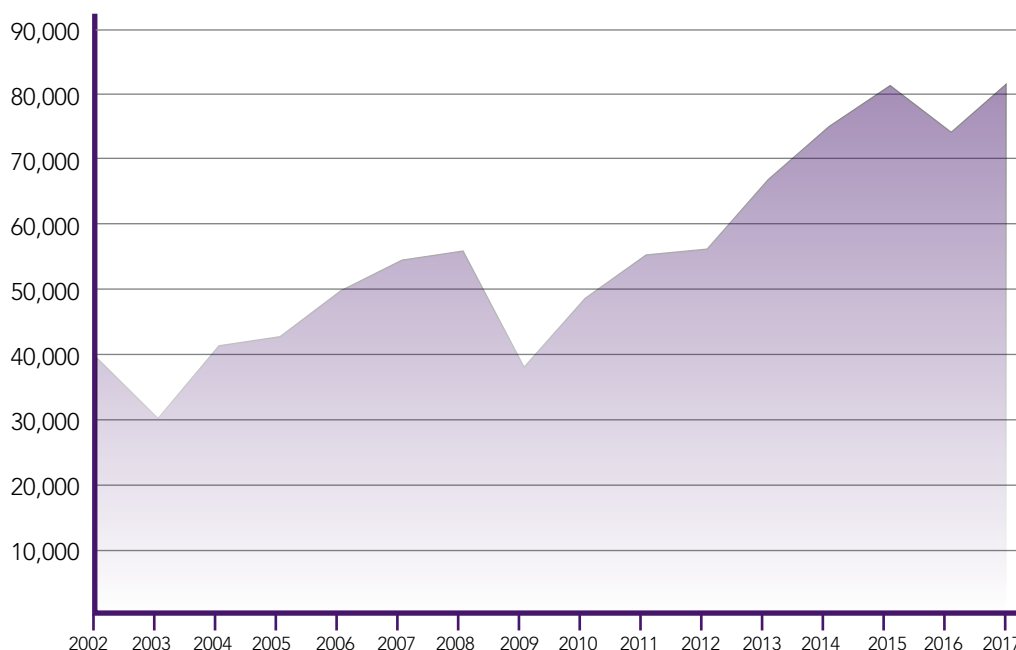
2) Temporarily restricted funds are held and managed separately from permanently restricted endowment in one of two portfolios, employing conservative investment strategies. One portfolio is primarily held in cash and the other portfolio is invested in bonds as well as cash.

3) The management and investment strategy of the pooled life income fund (PLIF) is reviewed annually with Key Private Bank. At March 31, 2017, 35% of the PLIF assets were invested in equities, 55% in fixed income assets and 10% 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 \$340,954 as of March 31, 2017. Assets are invested in a series of certificates of deposits.

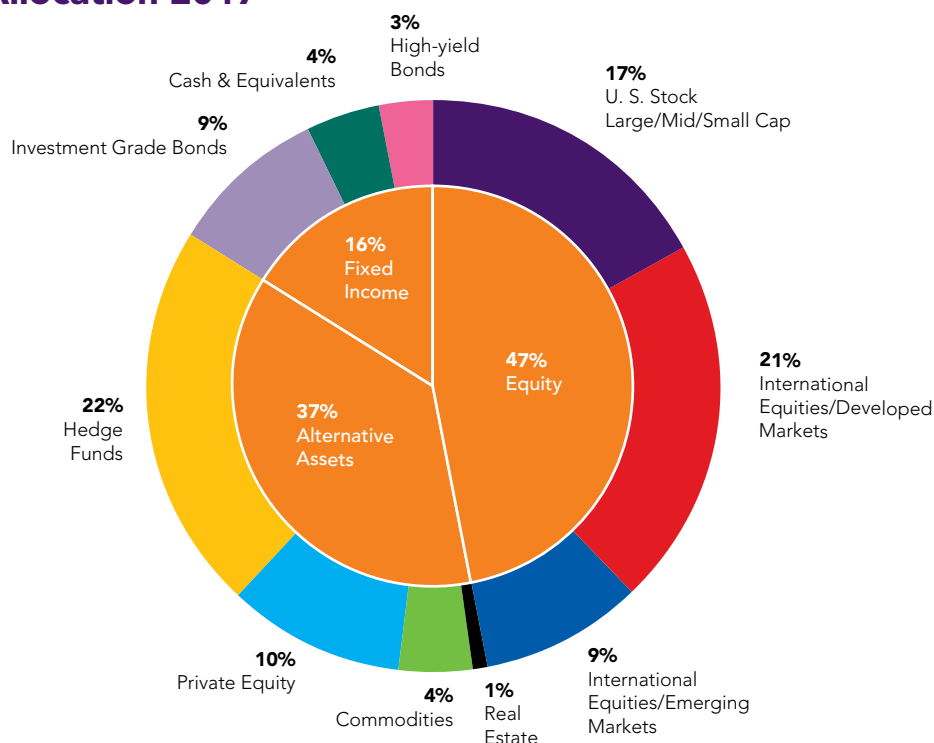
Endowment Investment Portfolio

This chart represents the endowment investment portfolio in thousands, which has grown by \$42.4 million over the past 15 years, from \$39.4 million as of March 31, 2002 to \$81.8 million as of March 31, 2017.



Endowment Asset Allocation 2017

Total endowment portfolio market value was \$81.8 million and as of March 31, 2017 was allocated as shown in the accompanying table.

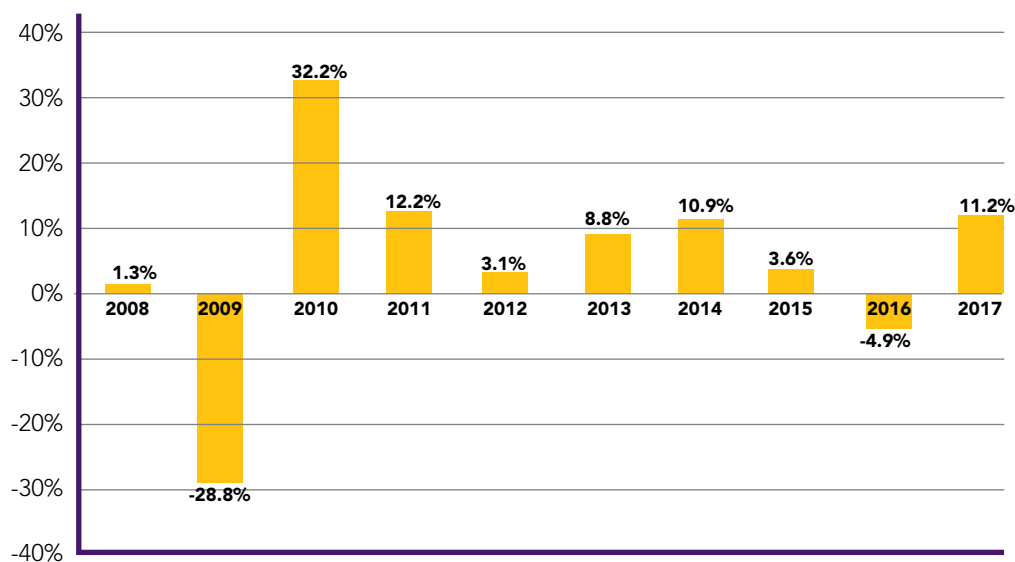


Annual Fiscal Year Performance

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, 2017 produced a gain of 11.2%. The 10-year return surpassed the diversified benchmark in each of the preceding 5 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.

10-Year Annualized Returns

	3/31/13	3/31/14	3/31/2015	3/31/2016	3/31/2017
Total Return	8.4%	6.2%	6.0%	3.7%	3.9%
Benchmark	7.8%	5.7%	5.3%	3.4%	3.2%



The Audit Committee reviewed and discussed the audited financial statements for the fiscal year ended March 31, 2017 with management and Lumsden & McCormick, LLP (L&M), the Foundation's independent auditor. The committee also concluded that L&M's provision of non-audit services, including tax preparation, is compatible with L&M's independence. The audited financial statements follow.

The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of March 31, 2017 and 2016, 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, 2017 and 2016 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 20, 2017

STATEMENTS OF FINANCIAL POSITION

March 31,	2017	2016
Assets:		
Cash	\$ 822,757	\$ 312,259
Contributions receivable (Note 2)	5,026,346	4,639,675
Investments (Note 3)	84,023,661	80,222,524
Property and equipment, net (Note 4)	31,041	37,038
Other assets	1,855,748	2,219,333
	<u>\$ 91,759,553</u>	<u>\$ 87,430,829</u>
Liabilities and Net Assets:		
Liabilities:		
Payable to the Institution (Note 5)	\$ 2,543,560	\$ 7,560,735
Accounts payable and accrued expenses	464,148	446,721
Amounts held in custody for others (Note 6)	340,954	486,180
	<u>\$ 3,348,662</u>	<u>\$ 8,493,636</u>
Net Assets (Note 7):		
Unrestricted	5,732,516	3,888,034
Temporarily restricted	12,715,451	9,516,117
Permanently restricted	69,962,924	65,533,042
	<u>88,410,891</u>	<u>78,937,193</u>
	<u>\$ 91,759,553</u>	<u>\$ 87,430,829</u>

See accompanying notes.

STATEMENTS OF ACTIVITIES

For the year ended March 31, 2017

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Revenues:				
Contributions:				
Cash received:				
Chautauqua Fund	\$ -	\$ 3,838,586	\$ -	\$ 3,838,586
Endowment	355,235	264,662	3,760,538	4,380,435
Other	-	53,334	-	53,334
Valuation adjustments and new pledges, net of collections	(194,812)	20,477	669,344	495,009
Total contributions	160,423	4,177,059	4,429,882	8,767,364
Interest and dividends	113,083	1,517,487	-	1,630,570
Net realized and unrealized gains (losses)	408,192	6,560,297	-	6,968,489
Total revenues	681,698	12,254,843	4,429,882	17,366,423
Expenses:				
Support to the Institution:				
Chautauqua Fund	3,838,586	-	-	3,838,586
Endowment direct support	2,031,962	-	-	2,031,962
Support from other funds	162,705	-	-	162,705
Development (Note 6)	992,908	-	-	992,908
General and administrative	866,564	-	-	866,564
Total expenses	7,892,725	-	-	7,892,725
Net assets released from restrictions	9,055,509	(9,055,509)	-	-
Change in net assets	1,844,482	3,199,334	4,429,882	9,473,698
Net assets - beginning	3,888,034	9,516,117	65,533,042	78,937,193
Net assets - ending	\$ 5,732,516	\$ 12,715,451	\$ 69,962,924	\$ 88,410,891

See accompanying notes.

For the year ended March 31, 2016

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

STATEMENTS OF CASH FLOWS

For the years ended March 31,

	2017	2016
Operating activities:		
Change in net assets	\$ 9,473,698	\$ (9,445,397)
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Net realized and unrealized (gains) losses	(6,968,489)	4,569,142
Depreciation	9,539	8,940
Changes in other operating assets and liabilities:		
Contributions receivable	(386,671)	1,806,101
Other assets	363,585	(1,858,579)
Payable to the Institution	(5,017,175)	5,138,014
Accounts payable and accrued expenses	17,427	(279,864)
Amounts held in custody for others	(145,226)	(142,103)
Net operating activities	(2,653,312)	(203,746)
Investing activities:		
Purchases of property and equipment	(3,542)	(2,856)
Purchases of investments	(8,331,550)	(12,428,412)
Proceeds from sales of investments	11,498,902	11,535,768
Net investing activities	3,163,810	(895,500)
Net change in cash	510,498	(1,099,246)
Cash - beginning	312,259	1,411,505
Cash - ending	\$ 822,757	\$ 312,259

See accompanying notes.

NOTES TO FINANCIAL STATEMENTS

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 20, 2017, 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 \$37,691,000 and \$36,061,000 at March 31, 2017 and 2016.

Support to the Institution:

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

Tax Status:

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

Use of Estimates:

The preparation of financial statements in 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.

2. Contributions Receivable:

	2017	2016
Pooled life income funds	\$ 3,396,010	\$ 3,331,637
Charitable remainder trusts	6,671,992	6,703,485
Unconditional promises to give	1,496,287	1,228,804
	11,564,289	11,263,926
Less discount	6,537,943	6,624,251
	<u>\$ 5,026,346</u>	<u>\$ 4,639,675</u>

Contributions receivable at March 31, 2017 are expected to be received over the periods shown below:

Less than one year	\$ 517,672
One through five years	978,615
Greater than five years	10,068,002
	<u>\$ 11,564,289</u>

3. Investments:

	2017	2016
Marketable securities:		
Cash	\$ 4,330,141	\$ 7,871,158
Equities	42,611,457	37,791,242
Fixed income securities	10,910,357	10,620,491
Alternative investments	25,837,791	23,587,155
Other	333,915	352,478
	<u>\$ 84,023,661</u>	<u>\$ 80,222,524</u>

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:

	2017	2016
Redeemable semiannually with		
105 days notice	\$ 9,823,523	\$ 8,854,153
Redeemable annually with		
95 days notice	8,335,161	7,757,765
Illiquid with return of capital		
allowed at varying dates during		
the period 2018 through 2029	7,679,107	6,975,237
	<u>\$ 25,837,791</u>	<u>\$ 8,854,153</u>

The Foundation has committed capital of approximately \$18,980,000 to private equity alternative investments. As of March 31, 2017, the remaining obligation under these commitments totaled approximately \$9,026,055.

Investment management fees of \$590,301 and \$599,881 for 2017 and 2016 are recorded in the statements of activities as follows:

	2017	2016
Fees netted against interest and		
dividends	\$ 165,915	\$ 169,227
General and administrative expense	424,386	430,654
	<u>\$ 590,301</u>	<u>\$ 599,881</u>

4. Property and equipment:

	2017	2016
Land	\$ 12,500	\$ 12,500
Building	152,275	152,275
Office equipment and furnishings	164,027	160,485
	<u>328,802</u>	<u>325,260</u>
Less accumulated depreciation	297,761	288,222
	<u>\$ 31,041</u>	<u>\$ 37,038</u>

5. Payable to the Institution:

Amounts payable at March 31:

	2017	2016
Income and principal	\$ 2,071,962	\$ 7,061,587
Income from prior periods	471,598	499,148
	<u>\$ 2,543,560</u>	<u>\$ 7,560,735</u>

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 2017 and 2016 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 2017 and 2016 development expenses in the accompanying statements of financial position and activities, respectively.

The Foundation guarantees a promissory note payable by the Institution totaling \$452,870 at March 31, 2017. Amounts held by the Foundation on behalf of the Institution to help repay the note totaled \$340,954 and \$486,180 at March 31, 2017 and 2016.

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. No borrowings on the arrangement were outstanding at March 31, 2017.

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 endowments 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:

	2017	2016
Board-designated endowments	\$ 5,002,841	\$ 4,587,239
Unrestricted gifts	919,966	922,932
Underwater funds	(190,291)	(1,622,137)
	<u>\$ 5,732,516</u>	<u>\$ 3,888,034</u>

Temporarily restricted net assets are comprised of unappropriated endowment gains and restricted gifts as follows:

	2017	2016
Gains - specified endowments	\$ 6,136,992	\$ 3,913,661
Gains - unspecified endowments	1,883,978	1,205,946
Term endowments	2,865,876	2,498,729
Temporarily restricted gifts	1,828,605	1,897,781
	<u>\$ 12,715,451</u>	<u>\$ 9,516,117</u>

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:

	2017	2016
Specified endowments	\$ 48,656,810	\$ 44,813,173
Unspecified endowments	21,306,114	20,719,869
	<u>\$ 69,962,924</u>	<u>\$ 65,533,042</u>

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 \$77,000 and \$72,000 for the years ended March 31, 2017 and 2016.

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, 2017 and 2016 were determined based on quoted prices in active markets.

Note 10 continued on next page.



Every Gift Matters

DAN AND LINDA SILVERBERG

For Dan and Linda Silverberg, a gift to Chautauqua Institution is not a gift. For all the joy that they've been given by the Institution, they perceive each donation as a measure of reciprocal exchange. "There's nothing that we can give to the Foundation or a fund or a program that would possibly amount to equal compensation for what we're getting," Linda said. "Philanthropy is paying it forward. It's saying I've already received and now I can give back."

The Silverbergs have already made special gifts in support of Chautauqua's inter-arts programming as part of their contribution to the Promise Campaign, and through a planned gift, they will establish an endowment to help attract special guest artists to perform with the Chautauqua Symphony Orchestra, as well as continue their support of the inter-arts at Chautauqua.

Dan and Linda are both retired and find gratification as patrons of the arts. A particular artistic interest in glass and ceramics motivated their most recent gift to the Chautauqua community. Jun Kaneko, a Japanese ceramicist, considered to be the most preeminent in the world, is known for experimenting in repetitive abstract motifs. The Silverbergs have owned his work "Between You and Me" for some time, and made the gracious decision to gift this valuable piece of art to the Institution. The sculpture has found its new home in the patio area near the Susan Hirt Hagen Center at the Chautauqua Amphitheater.

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, 2017 and 2016 is as follows:

	Unrestricted (Board-designated)	Temporarily Restricted	Permanently Restricted	Total
2017				
Endowment assets - beginning of year	\$ 4,587,239	\$ 7,618,336	\$ 65,533,042	\$ 77,738,617
Investment income:				
Interest and dividends	96,625	1,504,145	-	1,600,770
Net gains	421,531	6,551,993	-	6,973,524
Total investment income	518,156	8,056,138	-	8,574,294
Contributions	160,423	285,139	4,429,882	4,875,444
Appropriated	(262,977)	(5,072,767)	-	(5,335,744)
Endowment assets - end of year	\$ 5,002,841	\$ 10,886,846	\$ 69,962,924	\$ 85,852,611

	Unrestricted (Board-designated)	Temporarily Restricted	Permanently Restricted	Total
2016				
Endowment assets - beginning of year	\$ 10,223,041	\$ 12,692,951	\$ 64,144,528	\$ 87,060,520
Investment income:				
Interest and dividends	139,700	1,047,863	-	1,187,563
Net losses	(543,668)	(4,005,492)	-	(4,549,160)
Total investment loss	(403,968)	(2,957,629)	-	(3,361,597)
Contributions	33,477	39,087	1,388,514	1,461,078
Appropriated	(5,265,311)	(2,156,073)	-	(7,421,384)
Endowment assets - end of year	\$ 4,587,239	\$ 7,618,336	\$ 65,533,042	\$ 77,738,617

INDEPENDENT AUDITORS'

REPORT ON ADDITIONAL INFORMATION

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, 2017 and 2016 and have issued our report thereon dated June 20, 2017 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, 2017 and 2016 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.

Smulder & McCormick, LLP

June 20, 2017

For the years ended March 31, **2017** **2016**

Support to the Institution:

Chautauqua Fund	\$ 3,838,586	\$ 3,707,326
Endowment direct support:		
Capital	\$ -	\$ 5,000,000
Building, structures and grounds	246,964	330,785
General operations	481,235	11,754
Lectureship and CLSC	495,820	636,191
Performing arts	435,217	559,418
Religion	159,660	196,056
Scholarship and youth	213,066	272,381
	<u>\$ 2,031,962</u>	<u>\$ 7,006,585</u>

Support from other funds:

Capital	\$ 62,293	\$ 800,018
General operations	75,879	141,733
Lectureship and CLSC	20,158	41,882
Performing arts	-	-
Religion	-	80,012
Scholarship and youth	4,375	5,308
	<u>\$ 162,705</u>	<u>\$ 1,068,953</u>

Development:

Salaries and benefits	\$ 954,908	\$ 906,201
Promotion and communications	68,610	89,411
Office	48,357	44,517
Travel and hospitality	143,429	141,219
Professional and consulting	85,833	52,472
Equipment maintenance and repairs	33,433	20,250
Education	8,338	8,337
Reimbursement by the Institution	(350,000)	(350,000)
	<u>\$ 992,908</u>	<u>\$ 912,407</u>

General and administrative:

Investment management	\$ 424,386	\$ 430,654
Salaries and benefits	258,739	245,753
Office	12,736	12,926
Travel and hospitality	48,542	49,216
Professional and consulting	54,497	40,260
Equipment maintenance and repairs	65,841	22,132
Education	1,823	3,557
	<u>\$ 866,564</u>	<u>\$ 804,498</u>

Total expenses	\$ 7,892,725	\$13,499,769
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ENDOWMENT FUNDS

UNSPECIFIED FUNDS

\$25,710,904 Assets

\$480,202* Support to the Institution

* Does not include support provided to the Institution for development services.

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

- Paul M. Alexander Fund
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
Josephine A. Bell Endowment for Chautauqua
Bemus Fund for Chautauqua
Gordon Benn Fund
Alan J. and Mary Hough Blair Fund
Cora M. Blair Fund
- The Erika Block Fund for Chautauqua
Martha Borowsky Endowment Fund
Bosland Family Fund
Boyle Family Fund
Barbara A. and Patrick James Brady III Endowment
for Chautauqua
Sara E. Bradley Endowment for Chautauqua
Barbara and William Branch Fund
Daniel and Wanita Bratton Endowment
Lillian Brink Endowment Fund
Gary M. and Willow R. Brost Endowment for Chautauqua
Henrietta T. Campbell Fund
Maxine M. Carleton Fund
Katharine J. Carnahan Endowment
Barbara P. and Howard E. Chadwick Fund
Genevieve Chaney Fund
Julia and William Clinger Fund
Marion and Eugene Cohen Fund
Ruth K. Collyer Endowment
Jack and Marcia Connolly Fund for Chautauqua
- The Mildred K. Cooper Fund for Chautauqua
William F. and Thelma L. Cooper Endowment for Chautauqua
Helen and George L. Cornell Fund

- Katharine and Robert W. Cornell Fund
Sarah A. Corns Fund
Martha S.H. Cowles Fund
Helen T. and Ralph E. Crockett Endowment
Laura and Brad Currie Endowment for Chautauqua
Elizabeth Danielson Fund
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 Edgumbe 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. McCarn Fund
- Mary Jane and Donald McClurg Endowment
- Margaret C. Mercer Endowment
- Richard H. Miller Fund
- Dawson E. Charlotte B. Molyneaux Endowment
- Jane C. Morgan Fund
- Lewis W. & Katherine C. Morgan Fund
- James R. Morris III Fund
- The George E. and Susan Moran Murphy Family Fund
- Orlov Family Fund for Chautauqua
- Robert B. and June A. Osburn Fund
- Robert Pace Endowment Fund
- Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
- Mary C. and William H. Park Fund
- Mary Lou Cady Parlato Endowment for Chautauqua
- 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
- Evelyn Joyce Ramsdell Fund
- Mary Oram Reading Fund
- Agnes H. Reigart Fund
- Renjilian Family 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
- Allen and Elaine Short Endowment for Chautauqua
- Bert W. and Joanne R. Simons Endowment
- Elizabeth M. Smith Memorial Endowment for Chautauqua
- J. Vance Smith and Robert M. Smith Fund
- George T. and Margaret D. Snyder Endowment for Chautauqua
- Nancy Coburn Snyder Endowment Fund
- Thomas H. and Joan Stevens Family Endowment for Chautauqua
- Betty P. and J. Bruce Stromgren Fund
- Ann H. and Daniel F. Sullivan Endowment for Chautauqua
- The Robert C. and Patricia D. Switzer Family Fund
- Tate Family Fund
- Eleanor M. Thomas Fund
- The Susan and John Turben Foundation Endowment for Chautauqua
- Joseph & Elizabeth Verlie Endowment
- Carl A. and Mary Louise Viehe Family Endowment
- 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
- Betty Offutt Wood and BRAVAS Endowment for Chautauqua
- Henry L. Wood Fund
- John B. Yoder Endowment for Chautauqua
- Robert and Virginia Young
- The Deborah and Allen Zaretsky Fund
- Stephen J. Zenczak and Patricia E. Feighan Endowment for Chautauqua
- General Endowment Fund

ENDOWMENT FUNDS (CONT.)

SPECIFIED FUNDS

\$55,479,792 Assets

\$1,551,222 Support to the Institution

New funds are designated in orange.

PHYSICAL MAINTENANCE FUNDS

\$9,412,168 Assets

\$248,205 Support to the Institution

Buildings and Structures

\$7,784,494 Assets

\$200,315 Support to the Institution

Amphitheater Endowment Fund

Jack G. and Elizabeth L. Armstrong Fund for Youth Facilities

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
Bonfoux-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

McKnight Hall Maintenance Endowment

Kimberly and Robert Myers Dance Facilities Endowment

The Oliver Archives Center Endowment Fund

The I. Hale and Judy Oliver Fund for Bratton Theater

I. Hale and Judy Oliver Endowment for Connolly Residence Hall

The Rait Family Fund

The Ann Simpson Rice Youth Fund

School of Music Facilities Endowment

The Sharpe/Trefts Memorial Fund

Strohl Center Endowment

The Susan and John Turben Fund for Bratton Theater

The Sybil and Stuart Willen Fund for Bratton Theater

Youth Facilities Fund

Specific Gardens and Parks

\$1,110,432 Assets

\$35,221 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

The Bishop's Garden Fund

Selina W. Braham Memorial Garden Fund

Judge W. Walter Braham Garden Fund

Dr. Daniel and Wanita Bratton Garden Fund

The Henrietta T. Campbell Garden Fund

Carnahan-Jackson Memorial Garden Fund

The Carothers Family Garden Fund

The Kirk David Casto Memorial Garden Fund

Jean Chadwick Memorial Garden Fund

The CLSC Class of 1982 Helen W. Giacobine Garden Fund

Connolly Family Gardens and Fountains Endowment

The Cornell Garden Fund

DeeDee's Garden Endowment

The Ehrenreich Family Fund

The Fausnaugh Family Garden Fund

Peggy Foley Memorial Garden Fund

The Jean Rice Goodell Garden Fund

The Robert Y. Gromet Family Garden Fund

The Mary Kimball Haker Memorial Garden Endowment Fund

The Eleanor McKnight Haupt Fund

The Holden Garden Fund

Patricia K. Ives Memorial Beautification Fund

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
 Timothy Ritacco Play Area Endowment
 The Michael M. Ross Garden Fund
 The Mme. Shao Fang Sheng Garden Fund
 Toni Sterman Memorial Garden
 The Stephen Toms Garden Fund
 Randall E. Widrig Memorial Garden Fund
 The Dr. Alan Winkelstein Garden Fund
 The Roy and Dorothy Wissel Garden Fund
 The Frank Lloyd Wright Garden Fund
 The Frank Lloyd Wright School of Architecture and Taliesin Fellowship Garden Fund

General Grounds And Gardens

\$517,242 Assets

\$12,669 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

\$12,225,679 Assets

\$332,103 Support to the Institution

Lectureships

\$8,842,119 Assets

\$246,590 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 Barendsfeld 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 Jeannette D. Kahlenberg Lectureship Fund
 The Kevin and Joan Keogh Family Fund
 Barbara and Herb Keyser Fund
 Donald West King, Sr. and Francis Lila Lee King Lectureship
 The Oliver and Mary Langenberg Lectureship
 The Reginald and Elizabeth Lenna Lectureship in Business and Economics
 The Helen C. Lincoln Fund for International Programming
 The Louise Roblee McCarthy Memorial Lectureship
 McCredie Family Fund
 National Endowment for the Humanities Fund
 Joseph A. Neubauer Lectureship in Science
 Margaret Miller Newman Lectureship Fund
 Deloras K. and L. Beaty Pemberton Lectureship
 Kathryn Sisson Phillips Memorial Lectureship Fund
 The Richard and Emily Smucker Endowment Fund
 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

\$1,410,867 Assets

\$40,787 Support to the Institution

The Baird-Fuller Memorial Fund
 Caroline Roberts Barnum and Julianne Barnum Follansbee Fund
 The Alice M. Bentley CLSC Memorial Fund

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

Youth Activities

\$572,011 Assets

\$17,029 Support to the Institution

Ward T. Bower Youth Activities Memorial
 Elizabeth Elser Doolittle Fund for Youth
 The Gelb Family Endowment Fund
 Gelb Family Fund
 Cyril T. M. Hough and Lt. C. Randall Hough, USMC
 Memorial Fund
 The Katie Howard Memorial Fund
 Julius A. and Carol L. Nicolai Boys' and Girls' Club Endowment
 The Popp Family Fund
 Paul L. Sample Memorial Fund
 Andrew and Donna Sorensen Youth Activities Center
 Endowment
 The Laurence and Maria Wagner Family Fund
 Youth Activities Fund

Other

\$1,400,682 Assets

\$27,697 Support to the Institution

Lillian Brink Education Fund
 McCredie Family Director of Boys' and Girls' Club
 Emily and Richard Smucker Directorship for Education

FINE & PERFORMING ARTS FUNDS

\$15,451,942 Assets

\$434,542 Support to the Institution

General

\$3,020,715 Assets

\$90,112 Support to the Institution

The John T. and Katherine G. Bailey Family Fund
 Stacey and Evie Berger Endowment for Emerging Artists
 The Boyle Family Fund for the Performing Arts
 Emily and John Corry Endowment for the Performing Arts
 The Barbara Baldwin DeFrees Fund for the Performing Arts
 The Edith B. and Arthur E. Earley Fund for the Performing Arts
 The Endowment Fund for the Performing Arts
 John Alfred and Oscar Johnson Memorial Trust
 The Lenna Fund for the Performing Arts
 The Helen Cooper Mercer Fund for Performing Arts
 National Endowment for the Arts Fund
 The Rittman Family Fund for Performing Arts
 The Julia and Ralph C. Sheldon, Jr. Fund for the Performing Arts

Opera

\$4,133,269 Assets

\$109,917 Support to the Institution

A. Chace & Josephine B. Anderson Opera Endowment Fund
 John E. Anderson Opera Endowment
 The Peggy and Andy Anderson Family Fund for Opera
 The Cynthia Auerbach Fund for Opera
 Bemus Endowment for Opera
 Anne and John Burden Opera Fund
 Chautauqua Opera Endowment Fund
 The Chautauqua Opera Guild Endowment
 Thomas and Kathleen Clingan Fund for Opera
 The Connolly Family Fund For Opera
 The John A. and Emily McKnight Corry Opera Fund
 The Barbara Baldwin DeFrees Opera Fund
 The Walter F. Ferchen Opera Fund
 The Eleanor B. Franks Fund for the Opera
 The James and Elisabeth Groninger Fund for Opera
 The Jane A. Gross Opera Endowment
 The Kay Frantz Israel Fund for Opera
 The Mildred Lesenger Fund for Opera
 The Kay H. Logan Opera Fund
 The Annette Pickens Malvin Memorial Fund for Opera
 The Christopher and Susan Martin Opera Fund
 The Margaret Clark Mercer Fund for Opera
 The Ralph E. Miller and Paul E. Cawein Fund for Opera
 The Steve Z. and Mary G. Mitchell Family Fund

The Reverend Lloyd V. Moffett Opera Endowment Fund
The Robert G. and Lillian Vitanza Ney Family Opera Fund
The Joseph A. and Anne T. Prezio Opera Endowment Fund
The Richards Family Opera Fund
The Molly Rinehart Fund for Opera
The Wadsworth Fund
Charles Weaver and Family Fund for Opera
Dr. Fred R. Whaley and Helen A. Whaley Fund for Opera
The Robert and Virginia Young Opera Fund
Zemsky Endowment For Opera

Symphony

\$4,346,845 Assets

\$136,118 Support to the Institution

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

Chautauqua Symphony Orchestra Endowment Fund

The Carl and Lee Chaverin Fund

Shirley A. and Arthur R. Duffy Endowment for Classical Guitar

The William M. Kinley Fund for the Chautauqua Symphony Orchestra

William D. Kuhns Fund for General Music Purposes of Chautauqua Institution

The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra

Helen T. Logan Fund for the Chautauqua Symphony Orchestra

Mr. & Mrs. Sam A. Miller and Mr. & Mrs. Edward S. Babcox Memorial Fund

The Mischakoff/Taylor Concertmaster Chair Fund

Frances and George Newman Endowment for the Chautauqua Symphony Orchestra

Margaret Miller Newman Fund for the Chautauqua Symphony Orchestra

The David B. and Barbara Barrett Orr Music Fund

Av and Janet Posner Fund for the Chautauqua Symphony Orchestra

The Reinberger Fund for the Performing Arts

The Gertrude Aldredge Shelburne Fund

The Dr. James and Mary Anne Evans Singleton Fund for the Chautauqua Symphony Orchestra

Symphony Patron Endowment Fund for the Chautauqua Symphony Orchestra

The Trustees' Fund for the Chautauqua Symphony Orchestra

Mary E. Whitaker Symphony Endowment Fund

The Wilder Family Fund for the Chautauqua Symphony Orchestra

Nora J. Williams Symphony Fund

Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra

Theater

\$1,065,980 Assets

\$12,223 Support to the Institution

The Arnold and Jill Bellowe Fund for Theater

The Nancy E. Brewer Fund for Theater

Chautauqua Theater Fund

The Crockett Family Fund for Theater

The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming

The Joel and Barbara Jacob and M. Jacob and Sons Fund for Theater

Helen Moe Fund for Theater

The Florence and Cynthia Norton Fund for Theater

The Phoebe Wagner Ott Theater Fund

Dance

\$1,176,717 Assets

\$33,800 Support to the Institution

The Paul and Toni Branch Fund for Dance

Carnahan-Jackson Dance Chair Endowment

The Carnahan-Jackson Dance Endowment

Dakin Family Fund for Dance

Terrie Vaile Hauck Dance Endowment

Moore Fund for Dance

Visual Arts

\$1,708,416 Assets

\$52,372 Support to the Institution

Je'Anne Griffin Bargar Endowment for Visual Arts

The Chautauqua Art Association, Inc. Visual Arts Fund

Shirley Mix Flynn Visual Arts Endowment

Chip and Gail Gamble Visual Arts Endowment

Joan and David Lincoln Ceramics Endowment

Florence H. Norton and Cynthia Norton Visual Arts Endowment

Susan and John Turben Director of the VACI Galleries Endowment

RELIGION FUNDS

\$5,311,088 Assets

\$159,999 Support to the Institution

General

\$1,333,922 Assets

\$47,542 Support to the Institution

Campbell Department of Religion Fund

Eleanor B. Daugherty Fund

Department of Religion Fund

ENDOWMENT FUNDS (CONT.)

Department of Religion Leadership Fund
Carrell Leiper Hall Memorial Fund in Honor of Dr. Henry Smith
Leiper
Lois Raynow Department of Religion Fund
The Waasdorp Fund for Religious Initiatives

Chaplaincies

\$1,050,903 Assets

\$36,467 Support to the Institution

Marie Reid-Edward Spencer Babcox Memorial Fund
Gladys R. Brasted and Adair Brasted Gould Memorial Chaplaincy
Robert D. Campbell Memorial Chaplaincy
Daney-Holden Chaplaincy Fund
The Mr. and Mrs. William Uhler Follansbee Memorial Chaplaincy
J. Everett Hall Memorial Chaplaincy
Samuel M. and Mary E. Hazlett Memorial Fund
Jackson-Carnahan Memorial Chaplaincy
Alison and Craig Marthinsen Endowment for the Department of
Religion
The Geraldine M. and Frank E. McElree, Jr. Chaplaincy Fund
Randell-Hall Memorial Chaplaincy
Harold F. Reed, Sr. Chaplaincy
Edmond E. Robb-Walter C. Shaw Fund
John William Tyrrell Endowment for Religion

Lectureships

\$1,305,153 Assets

\$37,090 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

\$1,621,110 Assets

\$38,900 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
The Chautauqua Fund for Sacred Music
Fund for the Exploration of World Religions and Spiritual
Practices
The Jack and Gretchen Grigsby Fund for Choral Enrichment
The Holden-Daney Fellowship Fund
Dr. William N. Jackson Religious Initiative Fund
Arville G. Light, Jr. Fund for Religion
The Myra Baker Low and Katharine Low Hembree Family Fund
S.R. and Jennie Hamill McClure Family Fund
Harold F. and Mary Lou E. Reed Family Fund
The Reeve Family Choir Music Fund
Religious Initiatives Fund
The Ann Simpson Rice Flower Fund
The Allen Steere, Sr. Fund for the Department of Religion

SCHOLARSHIP FUNDS

\$6,557,105 Assets

\$194,370 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
Bonnetfoux/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
 Sarah Miller Caldicott Piano Scholarship
 The Andrew L. and Gayle Shaw Camden Fund for Theater Arts
 The Carnahan-Jackson Scholarship Fund
 The Chautauqua Art Scholarship
 The Chautauqua Golf Club Scholarship Fund
 The Chautauqua Theater Scholarship
 The Chautauqua Voice Scholarship
 Clark Scholarship Fund
 Joseph Clarke Scholarship Fund
 Clarkson Family Scholarship
 The Theodore R. Colborn Scholarship
 The William Cole/King Scholarship
 Beverly and Bruce Conner Scholarship Fund
 James and Barbara Copeland Scholarship Fund
 The Bettsy and Ellis Cowling Scholarship for Music
 The Daley Family Fund
 Eleanor B. Daugherty Scholarship Fund
 Diamond Jubilee Class of 1948 Scholarship
 Mary Lowe Dickinson Scholarship
 Dietrich Family Endowment for Music at Chautauqua
 The Mardelle Dressler Dobbins Scholarship
 The Rachel W. Eaton Scholarship
 The Bina Edkin Eckerd Memorial Fund for the Fine and
 Performing Arts
 The Robert Hunt and Mary Campbell Eckhardt Memorial
 Scholarship
 David and Miriam Yanes Eddleman Voice Scholarship
 The Miriam Yanes Eddleman Dance Scholarship
 The Michael and Jane Eisner Scholarship Fund
 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
 Dr. Stephen Fudell Memorial Scholarship Endowment
 The Harriet B. and Ralph T. Geller Memorial Scholarship
 Marjorie Geller Memorial Dance Scholarship
 The Elizabeth & Jack Gellman and Deborah & Allen Zaretsky
 Scholarship Fund
 General Scholarship Fund
 The Howard G. Gibbs Scholarship Fund
 Sheila Gitlitz Scholarship Endowment
 The Gitlitz Scholarship Fund for Visual Arts
 Glendorn Foundation Scholarship Fund
 Golay-Bradford Endowment for Families
 The Rosalyn Goldberg Scholarship Fund
 The Toni and Joseph Goldfarb Scholarship Fund for Fine &
 Performing Arts
 The Alfred E. Goldman Scholarship
 The Jessie D. Grassie Class of 1882 Scholarship
 Franklin P. & Fern Green and William P. & Ruth Bates Art
 Scholarship
 The Groff-Simpson Family Scholarship
 Grover Family Scholarship Fund
 G. Thomas & Kathleen Harrick Music Scholarship
 Harris Scholarship for Performing Arts
 Ruth Higby Haver and Della and David Higby Music Scholarship
 Lillian B. Hersh Music Scholarship
 William and Pauline Higie School of Dance Scholarship
 William and Pauline Higie School of Music Scholarship
 Robert D. Hiller Scholarship Fund
 The Arthur and Arlene Holden Scholarship for Chautauqua
 W.T. Holland Memorial Piano Scholarship Endowment
 Elke Kieserling Hoppe Scholarship
 Cyril T.M. Hough Memorial Scholarship Fund
 Ruth M. Skinner Hutchins Scholarship Fund
 Innes Family Scholarship for Studio Arts
 The Dorothy M. Jackson Memorial Scholarship in Piano
 The Lucinda Ely Johnson Scholarship
 The Max and Edythe Kahn Scholarship Fund
 The Nancy and Norman Karp Scholarship Fund
 Thomas E. Kaufman Memorial Music Scholarship
 The Kaylor Family Scholarship
 The Danny Kayne Music Scholarship Fund
 Audrey and Kenny Koblitz Scholarship
 Konneker Scholarship
 The John and Mary Lou Kookogey Scholarship
 Felicia and Andy Landis Memorial Fund
 The LaPenna-Koch Scholarship
 The Marilyn G. Levinson and Nathan Gottschalk First Chair
 Award for MSFO Endowment
 Anne R. Logan Scholarship Fund
 Craig J Luchsinger Memorial Scholarship
 The Anne Mary and Richard M. Maddy Music Scholarship Fund
 Marianne Elser Markham Endowment Fund
 Lillian W. Masters Scholarship Fund
 The Lucille J. McClure Memorial Music Scholarship Fund
 Roberta J. McKibbin Memorial Scholarship for Visual Arts
 Everett and Sarah Holden McLaren Scholarship
 Samuel R. McClure II Brass Scholarship

ENDOWMENT FUNDS (CONT.)

David L. and Jane K. Miller Art Scholarship
Laurie Miller Piano Scholarship
Laurie Miller Voice Scholarship
Ralph E. Miller Memorial Scholarship for Music
The Ralph J. Miller and Florence L. Miller Memorial Scholarship
in Music
The Sylvia Lucas Miller Scholarship in Music
The William E. Miller, Jr. Theater Scholarship
The Augusta L. Ebert Molyneaux Scholarship
The Elmer G. Molyneaux Scholarship
The Mary Louise Molyneaux Scholarship
Moore Scholarship Fund for Music
Jack I. and Barbara J. Morris Memorial Cello Scholarship
Gertrude T. Munger Piano Award Fund
The Abe Neches Scholarship for Dance
The Marian A. Neubauer Scholarship
Lily Lee Nixon Fund
The Fayette S. Olmstead Foundation and Pittsburgh National
Bank Charitable Trust Fund
The Bernard Paul Memorial Scholarship Fund
Mary Elizabeth Peffer Music Scholarship
Rosalie H. Pembridge Dance Scholarship
Pennsylvania Scholarship Fund
Pennybacker Memorial Scholarship
Charles John Petre Memorial Fund Trombone Award
William and Jane Pfefferkorn Scholarship for Music
The Ernest W. and Jeannette McClure Polley Scholarship
Av and Janet Posner Art Scholarship
Henry Rauch Memorial Scholarship
The Douglas A. Raynow Memorial Scholarship
Robert D. Redington Memorial Scholarship
Joseph W. and Marilyn Hyder Richey Scholarship Endowment
Rizzolo Family Fund
Roblee Scholarship for Families
Joseph H. and Florence A. Roblee Scholarship
The Catherine Prussing Rodgers Scholarship
The Josette and Ronald Rolley Scholarship
Mary McQueen Ross Scholarship
Glen and Ruth Roush Scholarship Fund
The Richard B. Rubin Scholarship Fund
The Sack Family Scholarship
Ann and Isidor Saslav Violin Scholarship in Honor of Mischa
Mischakoff
The Henrietta W. Schlager Scholarship
The Charles G. Schwartz Scholarship
Kuniko Washio Scollard Scholarship Fund for Music
The Sabina Mooney Seifert Memorial Scholarship
Shreveport Friends' Music Scholarship
A. Pope and Peggy B. Shuford Dance Scholarship

Ronald Perry Smith Scholarship Fund
The Dr. William T. and Virginia W. Smyth Fund
The Suzanne Gaider Sroka Scholarship
The Madge Ryan Stirniman Scholarship
George and Marianne Strother Scholarship Fund
Dessie B. Tichenor Scholarship Fund
Tustin Memorial Fund
Alfredo Valenti Scholarship Fund
Glenn G. Vance Music Scholarship Fund
Nina T. Wensley Scholarship
Katherine Karslake White School of Music Scholarship
The Dr. Frits & Corrie Wiebenga Scholarship Fund
The Rachel Wilder and Phil Lerman Scholarship
Victoria Willen Scholarship Fund for the Arts
The Mark W. Williams Scholarship
Mary Chenoweth Wright Scholarship Endowment
The Harriet G. Yanes Dance Scholarship
The John B. Yoder Music Scholarship
Chadwick Young Scholarship

FLEXIBLE PROGRAM FUNDS

\$4,421,294 Assets

\$135,700 Support to the Institution

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

The Donald Chace Shaw Fund
Tate Family Endowment for Fine and Performing Arts
The Edris and David H. Weis Family Fund

OTHER SPECIFIED FUNDS

\$2,100,516 Assets

\$46,303 Support to the Institution

Allegheny Jazz Society Fund
Barakat Fund
Jane and Tom Becker Endowment for Amphitheater Programs
Philip J. and Barbara S. Brunskill Fund
Buffalo-Chautauqua Idea and Connection: Galucki Family
Endowment Fund
The Cook Fund
Cornell/Ingram/Karslake Awards Fund
Elizabeth Dickson Memorial Fund
Valentine and Elizabeth Rider Frees Fund
The Joseph and Anna Gartner Endowment Fund
Gwin Family Fund
Charles Heinz and Louise Heinz Lockhart Fund
The Frank G. Karslake Fund
Samuel J. Kresge Fund
Elizabeth Miller Fund
Laura Ariane "Laurie" Miller Connections Fund
The Morgan-Ludwig Fund
The Helen M. Overs Fund
Jason and Nancy Weintraub Chautauqua Community Band
Endowment
Jack A. and Muriel Winter Endowment Fund
Jack R. Winter Fund
Michael Winter Fund
Thomas and Shirley Musgrave Woolaway Fund

TEMPORARILY RESTRICTED FUNDS

\$273,385 Assets

\$44,375 Support to the Institution

The Wendy Cohen Fund
Court Family Fund for Visiting Authors
Fowler Kellogg Maintenance Fund
The Will and Ann Lee Konneker Fund for Chautauqua
Harry A. Logan, Jr. Fund for the Performing Arts
Candace Littell and Scott Maxwell Endowment Fund
Percy Fund for Chautauqua

CUMULATIVE SUPPORT TO ENDOWMENT

The following donors have contributed \$10,000 or more to the endowment of the Chautauqua Foundation. We thank them for perpetuating the idea and place of Chautauqua. These totals include gifts received, pledged, transferred to the pooled life income fund and certain planned gift commitments made since May 1937.

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

In Excess of \$2,500,000

The Carnahan-Jackson Foundation
Emily and John Corry
Susan and Thomas Hagen
Elizabeth S. Lenna
Mr. and Mrs. Richard M. Rieser
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\$1,000,000 to \$2,499,999

Anonymous (1)
Mrs. Robert D. Campbell
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Dr. and Mrs. R. William Cornell
Mr. and Mrs. Robert W. Cornell
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AMPHITHEATER ENDOWMENT

The generosity of Chautauquans, and friends and neighbors in Chautauqua County, funded the Amphitheater project as it has funded many of the initiatives undertaken in recent years. The renewal of the Amphitheater has and continues to require an outpouring of support beyond anything in Chautauqua's history since the great depression.

As a statement of faith in Chautauqua's leadership and of confidence in its future, donors responded to allow the \$41.5 million building project to go forward and to begin to build a fund of \$5 million to care for the facility. Ensuring that the Amphitheater remains a safe, functional, well-kept facility with the latest equipment and technology is imperative for the benefit of future generations of attendees. To that end, Chautauquans are being asked to build a fund designed to last in perpetuity to care for and maintain the Amphitheater in future years. To date several hundred Chautauquans have donated. Would it not be great if 1,000 members of the community contributed toward this worthy end?

Chautauqua is recognizing donors to the construction of the Amphitheater and its future preservation by inscribing their names on monuments set on limestone bases in the west plaza of the Amphitheater. All donors of \$1,000 or more are eligible to be recognized. The monuments have been constructed to accommodate additional names in subsequent years and those who wish to contribute will be recognized in forthcoming years.

Additionally, the tradition of placing a plaque on an Amphitheater bench will continue and donors of \$15,000 or more may have a plaque inscribed. Prior to the 2018 season, existing plaques that had been located on the back of Amphitheater benches along with any new plaques will be installed.



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The Foundation expresses sincere appreciation to the many individuals, corporations, and foundations whose cash gifts to endowment were received during fiscal year 2017. We extend our thanks to these many contributors for their generous support — the very reason for our continued success.

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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.

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 Linda Wadsworth
 Laurence and Maria Wagner
 Carolyn and Bill Ward
 Jo-an M. Webb
 Herbert R. and Lorraine H. Weier
 Cynthia C. and Terry R. White
 Lee Chaverin White
 Heather L. Whitehouse and Caroline M.K. Le Vasseur
 Dr. Jeanne Wiebenga
 Mark Williams
 Dent and Joan Williamson
 Lou B. Wineman
 Sally L. Wissel
 Susan O. Wood
 Shirley Musgrave Woolaway
 Nancilee Wydra
 Caroline Young
 Robert and Donna Zellers
 Stephen Zenczak and Patricia Feighan
 Barbara Zuegel

2017 MEMORIAL GIFTS

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

Abbie
R. Quintus Anderson
Edward T. Arnn
Nancy Miller Arnn
James M. Bailey
Dennis A. Beagle
Agnes Billisits
Nancy Board
Patrick James Brady
Stephen C. Brown
Elberta Buerger
Sarah Miller Caldicott
Judy Clinger
Ted and Connie Colborn
John and Emily Corry
Eleanor Bradford Currie

Hal and Aggie Fausnaugh
Joan Fox
Aimee Chesler Fredette
Suzanne Fromson
Marjorie Geller
Jim Getty
Stanley Goldhamer
Jean Rice Goodell
Susan H. Hagen
William Murray Hamner, Jr.
Beverly Hand
Norma Hunsinger Hay
Robert Hesse
Warren Hickman
Ernest and Ruth Himebauch
Richard Kahlenberg
Ryan Kiblin
Will Konneker
Dr. Jerome Kowal
Mary Langenberg
Joan Lincoln

John Lindauer
Lisse
Kay Logan
Craig Luchsinger
Flora Mackenzie
Kenneth Edward Marks
Betty Marshall
John McCabe
McKenzie
Judy Jones McMillin
Laurie Ariane Miller
Margaret Miller
Lewis and Tass Morgan
Robert J. Murray
Ruby Neville
Dorothy Barhite Newman
Frances and George Newman
Mary Cornell Park
Joanne Paterson
Elanor Powell
Sam Price, Sr.

Martha Reed
Suzanne Reid
Timothy Ritacco
Catherine Prussing Rodgers
Adeline Roemer
Edward K. and Jane H. Rogers
Benjamin Mitchell Roose
Jerry Shaffer
Lori Sherman
Anne "Penny" Small
Betty Sprague
David N. Walcher
Ernest "Mike" Walker
Mary Whitaker
H. Thomas Wineman
Paul Wipasuramonton
R.D. and Mary Easterday
Young

2017 HONORARY GIFTS

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

Stephen Ames
Tom and Jane Becker
Arnold Bellowe
Caroline Bissell
Karen Blozie
Leiden Brueschke
Thane Brueschke
Joan Brown Campbell
Rick Evans
Joseph and Toni Goldfarb
Don and Kathy Greenhouse
Kent and Fredrika Groff
Karen Heitzenrater
Richard and Karen Heitzenrater
Susan and Nelson Helm
Carol and Mike Hirsh
Louise Jackson
Bob Jeffrey
Judith Katz
Blossom Leibowitz
Ross Mackenzie
Marty W. Merkley

Rossen Milanov
Miller and Arnn Families
Deborah Sunya Moore
Rosalie Pembbridge
Howard and Barbara Schiller
William Scollard and Kuniko Washio
Jennifer Shore
Ann Slonaker
Lowell K. and Rebecca Young Strohl
Susan Wood



Every Gift Matters

J. MARCUS AND ELLEN FULTZ

J. Marcus and Ellen Fultz met at Chautauqua forty years ago when they both visited for the first time with their families to spend the summer studying music. Given her parent's instrumental role in introducing her to Chautauqua and, as a result, her meeting Marc, Ellen wanted to find a way to honor their legacies and love of Chautauqua. The Arline and Ralph Bernstein Memorial Rain Garden in Miller Park does just that.

Ralph passed away in 2014, Arline in 2006, but both held the Institution close to their hearts. Having been an engineer, Ralph was familiar with and interested in water conservation. Arline simply enjoyed the whole aesthetic of the Institution. "I just thought my mother would have delighted in the beauty it added to the space," Ellen said of the garden. "And I know my father would have embraced the importance of utilizing the nutrients from rainfall before the runoff goes into the lake. It was just kind of a perfect scenario to fund it."

Abundant with plant and flower varieties such as purple coneflowers and Black-eyed Susans, it's nearly impossible to miss the hundreds of thirsty bees nestling for nectar in the Bernstein Garden. At the end of the day, Marc and Ellen come around to look at the garden, not only as a remembrance of people they loved, but as a way to return a favor to the Institution. With their gift they also created an endowment that supports the care and maintenance of the garden from year to year.

Excited about the new Amphitheater and continually energized by the variety of programs that happen in that space, Marc and Ellen recently made an additional commitment to the Institution. The Fultzes have established an endowment to support one of the new rain gardens installed near the Susan Hirt Hagen Center at the Chautauqua Amphitheater. It is their hope that the garden will bring added enjoyment to those headed to and from the Amp.

OFFICERS, DIRECTORS AND STAFF

Directors

Term Expires

David W. Anderson of Hingham, Massachusetts • 2, 5	2019
Cathy Bonner of Austin, Texas - <i>ex officio</i> • 1, 2, 3, 4, 5, 6, 7	2017
<i>Chair, Executive Committee</i>	
<i>Chair, Board of Directors</i>	
Andrew L. Camden of Grosse Pointe, Michigan • 3, 5	2017
<i>Chair, Investment Committee</i>	
John S. Connolly, Jr. of Boynton Beach, Florida • 3, 4, 7	2018
Georgia M. Court of Sarasota, Fla. • 5, 6	2020
Laura P. Currie of Nashville, Tennessee • 2, 4, 6	2017 ⁱ
Lauren Rich Fine of Shaker Heights, Ohio • 5, 7	2020
Karen J. Goodell of New York, New York • 2, 3	2017
<i>Chair, Development Council</i>	
William R. Goodell of San Francisco, California • 4, 5	2018
Thomas B. Hagen of Erie, Pennsylvania • 1, 6	2017
Michael E. Hill of Washington, D.C. • 3	ii
William M. James of New York, New York • 3, 6	2020
<i>Chair, Nominating & Governance Committee</i>	
John A. Milos of Orange Village, Ohio • 2, 7	2019 ⁱ
Susan Moran Murphy of Chautauqua, New York • 1, 5	2018
Anne Odland of Washington, D.C. • 1, 3	2018
<i>Chair, Audit Committee</i>	
George T. Snyder of Pittsburgh, Pennsylvania • 3, 4, 7	2017
<i>Chair, Personnel Committee</i>	
Richard Wade of Fountain Hills, AZ • 1, 4, 7	2020
Stephen J. Zenczak of Gates Mills, Ohio • 3, 4	2019
<i>Chair, Finance Committee</i>	

Officers

Cathy Bonner • Chair
 Karen J. Goodell • 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

Joshua C. Auflick • Research Associate
 Chris J. Baglia • Gift Administrator
 Karen Blozie • Senior Major Gifts Officer
 Jacqueline A. Chagnon • Director of Stewardship & Donor Relations
 Christine A. Doolittle • Administrative Project Manager
 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
 Leah R. Stow • Assistant Director of the Chautauqua Fund
 Nicole K. Szydlo • Senior Researcher & Coordinator of Information Strategy

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|-------------------------|---------------------------------------|
| 1 - Audit Committee | 5 - Investment Committee |
| 2 - Development Council | 6 - Nominating & Governance Committee |
| 3 - Executive Committee | 7 - Personnel Committee |
| 4 - Finance Committee | |

ⁱ Coincides with term on the Chautauqua Institution's Board of Trustees

ⁱⁱ Coincides with term as President of Chautauqua Institution

FORMER DIRECTORS

Former Directors and Terms of Service

Wilson C. Price • May 1937 to August 1962
Mrs. E.J. Bellinger • August 1937 to October 1963
Mrs. L. D. Boal • August 1937 to August 1955
Samuel M. Hazlett • August 1937 to July 1956
James H. Matthews • August 1937 to 1939
Walter Roberts • August 1937 to March 1959
David L. Starr • August 1937 to 1951
Mrs. Livingston Hunter • August 1939 to 1942
Mrs. Dorothy Smith • August 1943 to 1950
Walter F. Rittman • August 1950 to September 1954
Harold F. Reed • August 1951 to August 1971
Mrs. Walter F. Rittman • August 1955 to January 1964
Paul N. Anderson • August 1955 to August 1965
Walter C. Shaw, Jr. • August 1956 to August 1974
John D. Hamilton • July 1959 to August 1971
Samuel P. Price, Sr. • August 1962 to August 1995
Mrs. Dorothy W. Cook • August 1964 to August 1987
Lewis W. Morgan • August 1964 to August 1990
Nancy Miller Arnn • August 1965 to August 1989
Richard H. Miller • August 1971 to August 1996
J. Donald Patton • August 1971 to August 1984
Howard G. Gibbs • August 1974 to August 1990
Oscar E. Remick • September 1975 to December 1976
Robert S. Bargar • August 1976 to August 1994
Mrs. Mary B. McDowell • August 1976 to August 1982
John S. Rogers • August 1976 to August 1986
David H. Carnahan • August 1976 to January 2000
George L. Cornell • August 1976 to August 2001
Joseph A. Neubauer • August 1977 to November 1983
Robert R. Hesse • January 1978 to November 1983
Richard L. Bechtolt • August 1982 to July 2006
Daniel L. Bratton • December 1983 to December 2000
Edward P. Boyle • August 1984 to August 1994
Frank E. McElree, Jr. • August 1984 to August 1996
H. David Faust • August 1986 to June 1988
Mary Frances Cram • August 1987 to August 1993
Robert B. Osburn • August 1989 to August 1996
Harold F. Reed, Jr. • August 1989 to August 2001
Eugene S. Cohen • August 1990 to August 1998
George L. Follansbee, Jr. • August 1990 to March 2004
Hal A. Fausnaugh • April 1990 to August 1994
R. Quintus Anderson • April 1991 to August 1995
William F. Hill, II • April 1991 to August 2005
Patricia Goldman • August 1992 to August 2003
Marilyn G. Levinson • August 1992 to August 2000
William H. Park • August 1993 to August 2005
James G. Groninger • August 1994 to August 2014
William G. Karslake • August 1994 to August 1995
Thomas R. Bromeley • August 1995 to June 2001
vic gelb • August 1995 to August 2011
Selina P. Johnson • August 1996 to August 2008
Wilfred R. Konneker • January 1996 to August 2006
Lowell K. Strohl • August 1996 to February 2010
Miriam S. Reading • January 1997 to August 2006
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
Thomas M. Becker • January 2005 to December 2016
Christopher H. Lytle • February 2005 to August 2014
John W. Burden, III • August 2005 to October 2007
Kathryn J. Lincoln • August 2005 to December 2011
I. Hale Oliver • August 2005 to August 2013
George T. Snyder • August 2006 to August 2007
Steven W. Percy • August 2007 to August 2015
John A. Corry • January 2008 to August 2013
Charlotte A. Fowler • August 2008 to December 2012
John E. Anderson • August 2008 to August 2016
Gary M. Brost • May 2010 to August 2016
John S. Kobacker • August 2011 to September 2016
P. James Brady • August 2015 to August 2016

Former Board Leadership

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



CHAUTAUQUA FOUNDATION

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foundation@chq.org
www.chautauquafoundation.org

2018 Annual Membership Meeting
Saturday, August 18 • 9 a.m.