



CHAUTAUQUA FOUNDATION

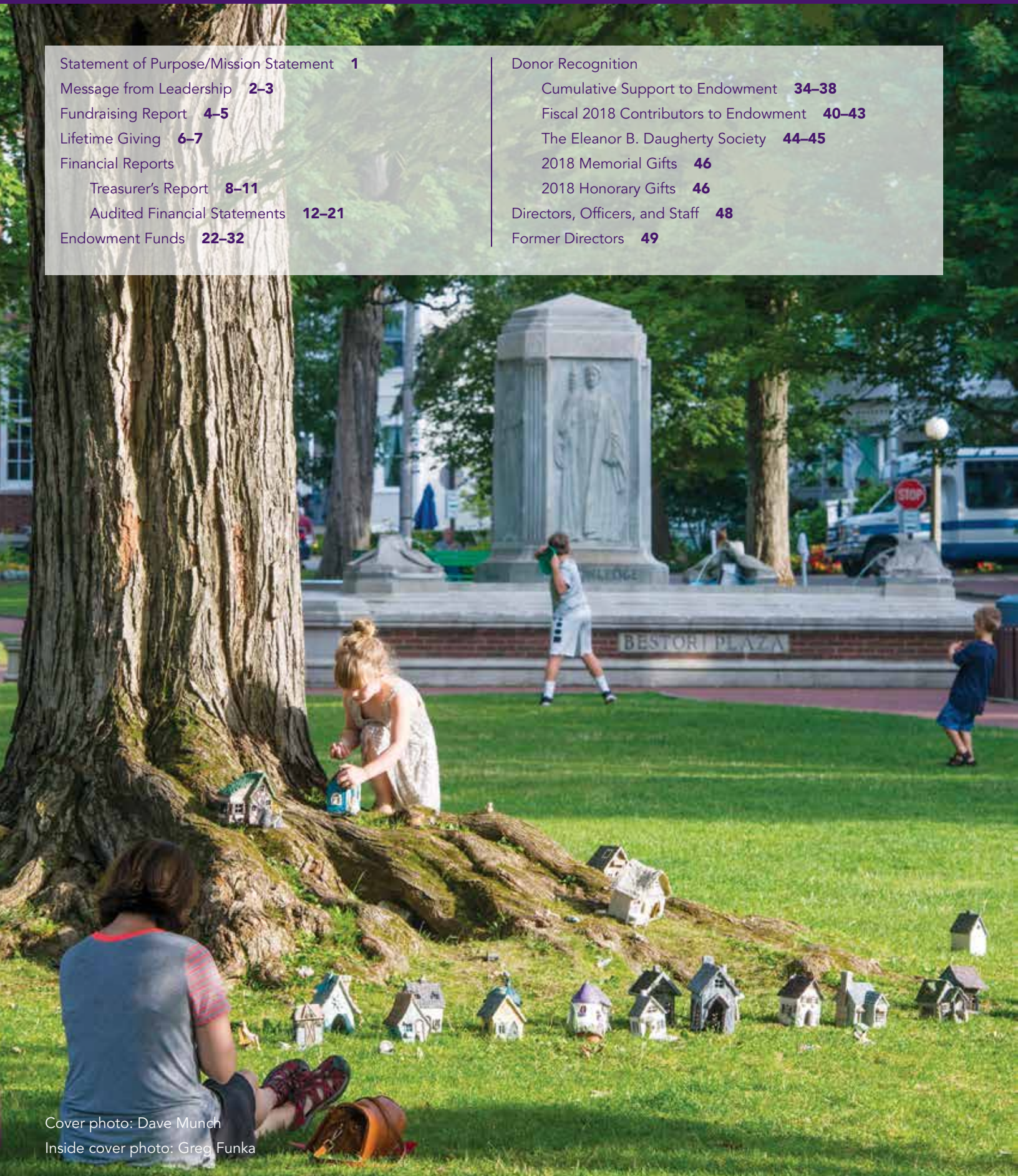
2018 ANNUAL REPORT



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Cover photo: Dave Munch
Inside cover photo: Greg Funka

STATEMENT OF PURPOSE

Article II, Corporate Charter May 14, 1937

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

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

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

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

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

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

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

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

MISSION STATEMENT

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

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

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

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

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

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

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

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



Dear friends,

Many foundations support numerous organizations through their grant awards and endowments each year. The Chautauqua Foundation is atypical, in that it was established in 1937 to solely benefit Chautauqua Institution. As a result, when changes occur at the Institution such as a change in leadership or a change in institutional focus or priorities, the Foundation must too redirect its course to maintain a vibrantly supportive partnership with the Institution. Our fiscal year from April 1, 2017, until March 31, 2018, was one of those years which called for a new nimbleness by the Foundation.

In fiscal year 2018, the first summer of Michael Hill's presidency, the Foundation continued its leadership role in his introduction to the community. Nine months later, the Foundation facilitated donor participation in a community of voices engaged in the strategic planning discussions underway at the Institution.

Early in this year, we celebrated the remarkable success of the Promise Campaign and its most glorious achievement — a renewed Amphitheater on the existing site thanks to unprecedented and generous philanthropy. Not only did the work of the Foundation and its many volunteers secure the philanthropic dollars needed for the project, the Foundation continues to play an important role in assisting the Institution in the short-term financing of the project as pledge payments are received.

The last nine months of calendar 2017 comprised the primary fund raising timeframe for the 2017 Chautauqua Fund. Under the leadership of Cathy Nowosielski and Jeff Lutz, who were completing their third and final year as co-chairs of the Fund — and in a Chautauqua celebrating the leadership of its new president — the Chautauqua Fund surged beyond its goal of \$4,000,000 and raised 5.4% more dollars from 6.2% more donors than the prior year.

During fiscal year 2018, the Foundation led a conversation among leadership of how to appropriately re-define what gifts should be recognized within the Chautauqua Fund. Thus, we have created a more equitable recognition system and, we hope, one that will inspire Chautauquans to support the broad range of interests that define the Chautauqua experience.

As you will read in this report, the net assets of the Foundation grew by over \$7 million during the year and the assets under management grew by a similar but larger amount. As the Foundation's investments move toward the \$100 million level, the Investment Committee of the Board, in conjunction with Hirtle, Callaghan & Co., our outsourced chief investment officer, are in a regular review of asset allocation. During this year, the new CEO of Hirtle Callaghan, Ranji Nagaswami, visited the

Institution and members of the committee had opportunities to increase its understanding of the impact of her leadership on this key service provider to the Foundation.

Also during the year, a sub-group of the Investment Committee—with help from two non-board members with great experience and expertise in the hedge fund arena—led a redeployment of almost \$9 million in assets from a fund of funds manager to an existing fund manager of the Foundation, Pointer Management, LLC. Since the Chautauqua Foundation's original investment with Pointer in 2006, they have provided superior returns against industry benchmarks and continue to follow strategies the Investment Committee believes will help to preserve capital in the challenging conditions that history tells us will come.

We closed out fiscal year 2018 in March, beginning to look ahead to the implications of a new strategic plan for the Foundation by asking a series of questions. Is the Foundation ready to meet the opportunities that lie ahead for the Institution? What, if any, additional staff may be required to leverage new funding sources beyond the gates? Is the Foundation spending its resources on the most important activities to produce growth in the assets upon which the Institution may draw? What fund raising programs must be re-envisioned and what new initiatives might we undertake given improvements in technology and data management systems?

Those questions and more will be part of the agenda for the year ahead and the subject of next year's letter in the

annual report as this important work unfolds. We invite you to review the information on the pages following, which also acknowledge the collective generosity of the Foundation's membership and this community. We do so with gratitude for your investment in the Foundation and Institution. We welcome your thoughts and comments at any time.

Sincerely,


Cathy Bonner,
Chair, Board of Directors


Geoff Follansbee,
Chief Executive Officer



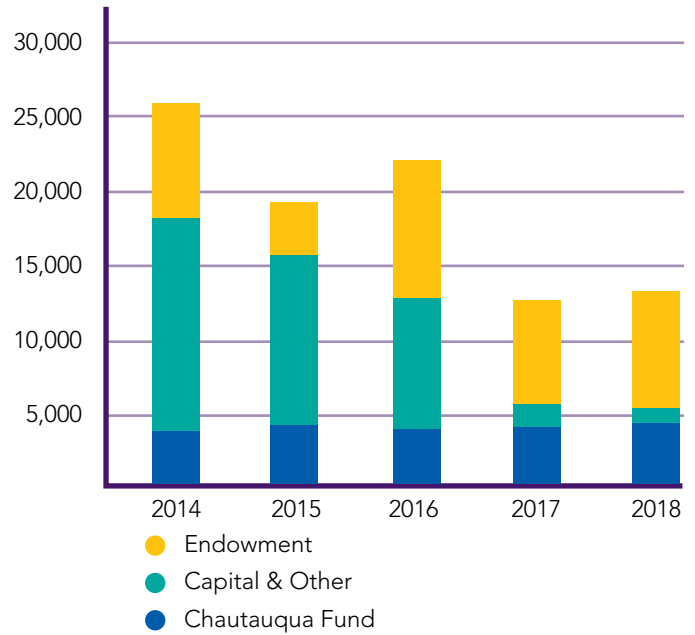
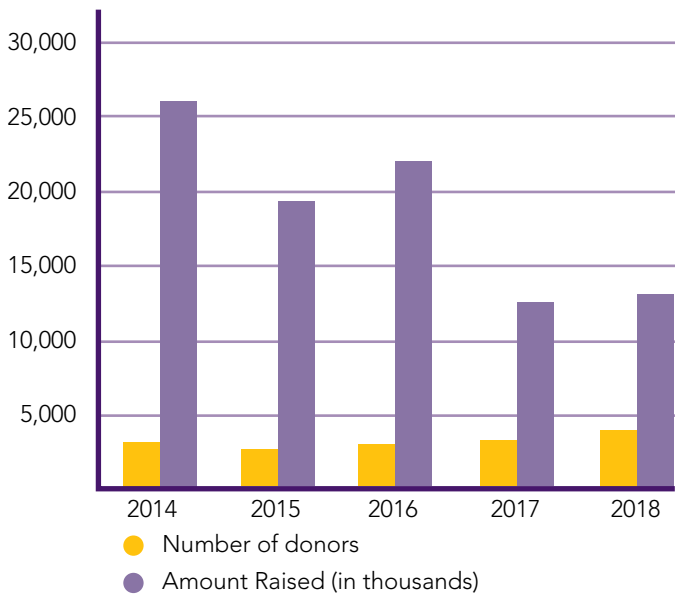
FUNDRAISING REPORT

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 and includes shifting other special gifts into the 2018 Chautauqua Fund.

Fiscal	Chautauqua Fund	Endowment	Capital & Other	Total	Donors
2018	\$ 4,555,953	\$ 7,060,417	\$ 1,004,425	\$ 12,620,795	4,198
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



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 40–43.

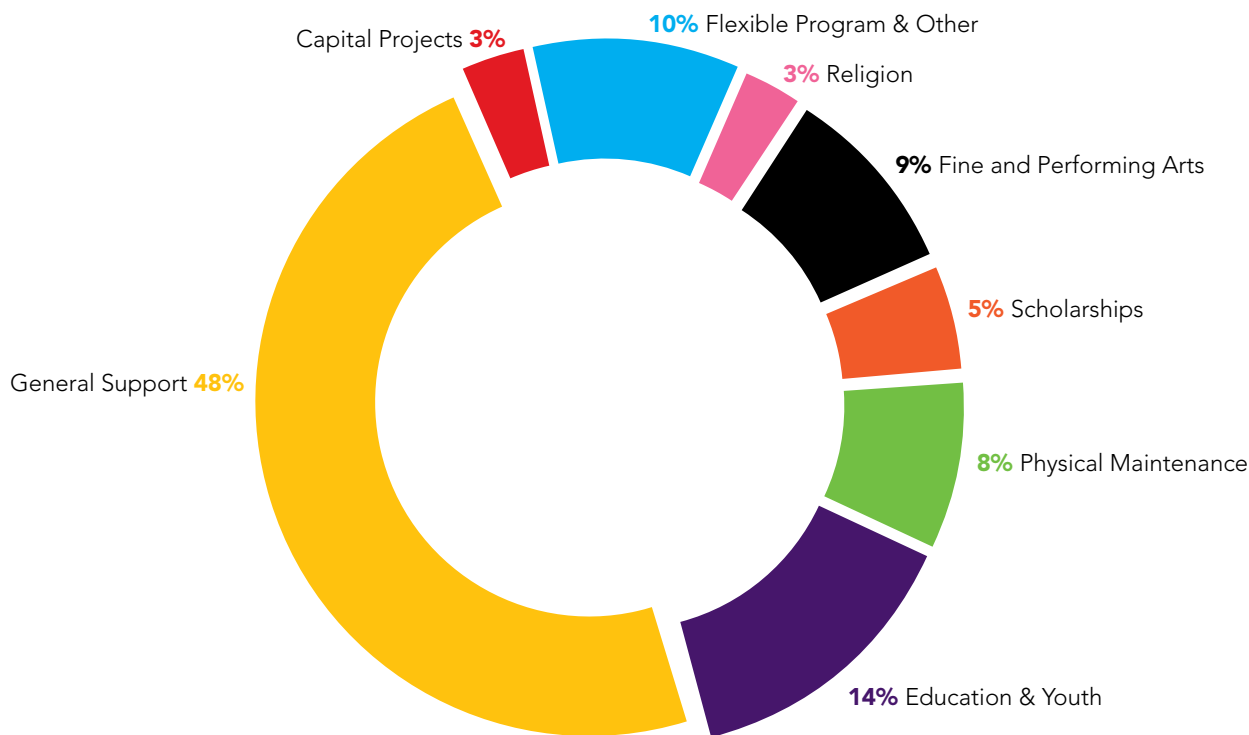
Capital & Other

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

Donors who have made capital or special gifts are recognized on a calendar year basis in the winter *Chautauquan*.

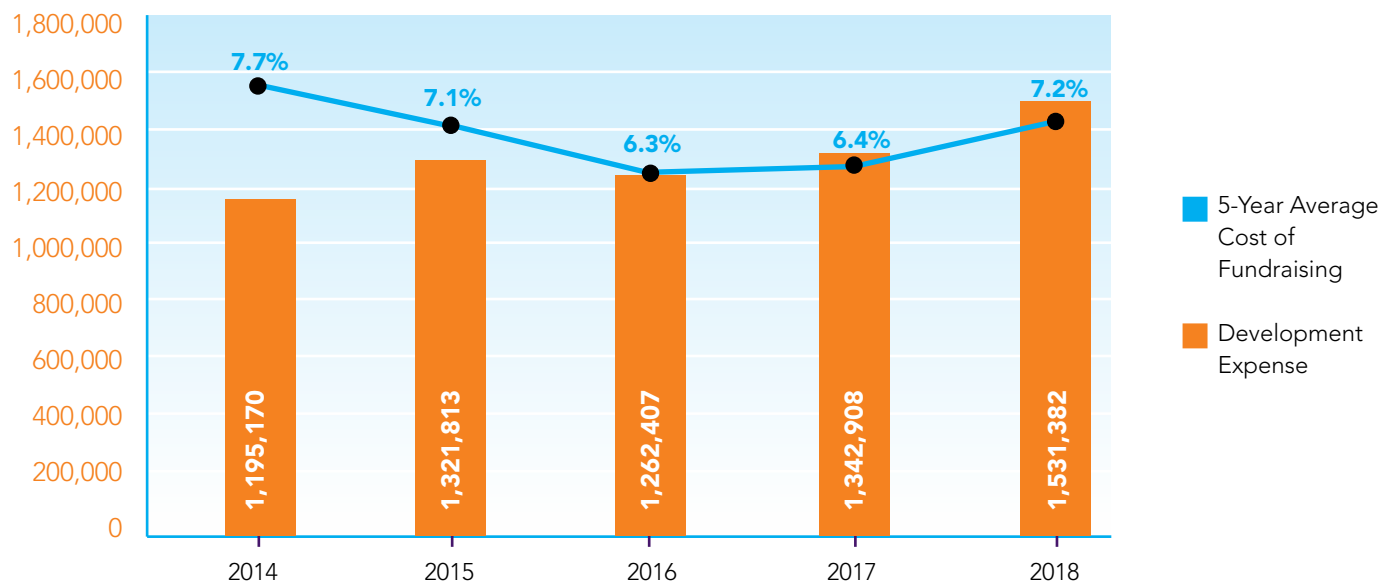
Total Giving by Area of Support

This chart represents total philanthropy of \$12.6 million for the fiscal year ended March 31, 2018 by area of support.



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 was 7.2% for 2018.



LIFETIME GIVING

Numerous individuals and organizations have expressed their commitment to Chautauqua through extraordinary expressions of philanthropy. This lifetime giving list recognizes and thanks the cumulative generosity of donors to the annual Chautauqua Fund, capital projects, endowment or who have pledged or transferred, assets as part of certain planned gift commitments, a cumulative amount in excess of \$250,000.

We have highlighted donors new to this list in [orange](#).

Greater than \$5,000,000

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

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

The Carnahan-Jackson Foundation
Jack Connolly
Emily and John Corry
Gebbie Foundation, Inc.
The Hultquist Foundation, Inc.
The Lenna Foundation
Elizabeth S. Lenna
Joan and David Lincoln
Lippman Kanfer Family Foundation
Kay H. Logan
Elaine and Richard 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.
Mrs. Robert W. Cornell
Mr. and Mrs. George L. Cornell
Dr. and Mrs. R. William 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
Betsy C. Goodell
William R. Goodell
Stewart and Donna Kohl
Dr. and Mrs. W.R. Konneker
The Kresge Foundation
Mrs. Charles H. Lytle
The Milton and Tamar Maltz Family Foundation
Jesse and Cathy Marion
Bruce W. and Sarah Hagen McWilliams
Mary Anne and John Morefield

New York State Council on the Arts
Hale and Judy Oliver
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

Edward L. Anderson, Jr. Foundation, Inc.
Dorothy L. Anderson
Sandy and Quint Anderson
Arnold and Jill Bellowe
Caroline Van Kirk Bissell
Kathy and James Braham
Gary M. and Willow R. Brost
John W. and Anne Staples Burden
Andrew L. and Gayle Shaw Camden
Mr. and Mrs. David H. Carnahan
Town of Chautauqua
Chautauqua Opera Guild
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.
Dr. Barb Mackey
Dr. and Mrs. John W. McCredie, Jr.
Robert and Sally Metzgar
Mr. and Mrs. John A. Milos

George E. and Susan Moran Murphy
Ralph H. and Elizabeth C. Norton Philanthropic Trust
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

Andy and Peggy Anderson
John E. Anderson
Edward L. Anderson and Joan E. Parsons
Clement and Karen Arrison Foundation
[John T. and Katherine G. Bailey](#)
Barbara and Arthur Banner
[Wendy and David Barenfeld Family Charitable Fund](#)
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
[The Byham Family](#)
Chautauqua County Visitors' Bureau
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
Jane Fortune
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
Kathryn Lincoln
Helen T. Logan Charitable
Trust
James H. Lynch, Jr.
Alison and Craig Marthinsen
Warren K. Martin
Chris and Sue 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
Gloria Plevin
PNC Financial Services Group
Richard A. and Esther M. Popp
Sam and Petey Price
Mrs. Lois Raynow
Mrs. Bartlett Richards
Molly F. Rinehart and Charles
L. Christian
Marjorie McCarthy Robins
Joseph H. and Florence E.
Roblee Foundation
Herbert B. and Gerda Sachse
Mr. and Mrs. Ralph C.
Sheldon, Jr.

**Dr. Robert G. and Katy T. Smith
Sutton Trust**
Susan and John Turben
Foundation
VACI Partners
Tara VanDerveer
John and Linda Wadsworth
Dr. and Mrs. Robert J. Weiss
Norman and Marilyn
Weizenbaum
The Margaret L. Wendt
Foundation
Lutie Soper Wilsdon Memorial
Virginia H. and Robert R.
Young
Shirley and Sam Zemsky
Mr. and Mrs. Howard Zemsky
Steve Zenczak and Pat Feighan



Photo: Greg Funka

Financial Overview

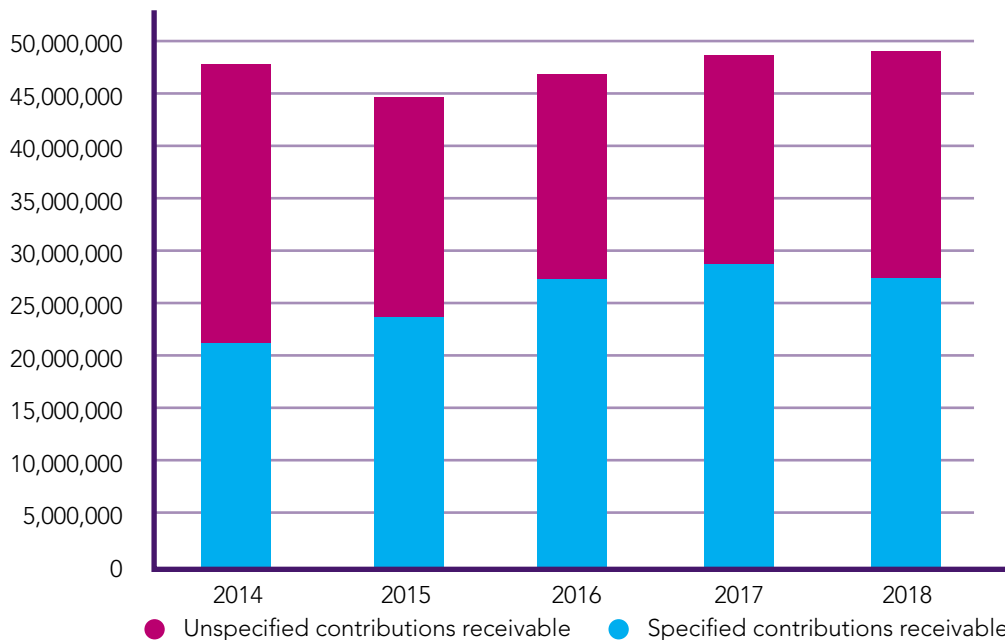
Net assets of the Foundation increased by \$7.3 million in the fiscal year ended March 31, 2018 to \$95.7 million and total assets reached \$99 million. Donors created 24 new endowment funds. The investment portfolio produced a double-digit gain for the second year in a row, increasing the endowment portfolio by over \$8 million.

The Foundation utilized a bank revolving credit note during the fiscal year to help the Institution cover the timing difference between receipt of pledge payments and costs incurred for

the renovation of the Amphitheater. Through excellent cash management by the Institution, the amount drawn did not exceed \$4.4 million and was paid down completely by March 31, 2018. Only \$55,224 of interest expense was incurred. The Finance Committee of the Foundation closely monitored this activity as well as continuing its work with the Investment Committee on maintaining spending rates in a relatively low return market environment. The goal remains to balance the delivery of the maximum amount possible to the Institution and the Foundation's responsibility to long-term sustainability.

Endowment Contributions Receivable

New pledges and planned gift intentions, when combined with the previously stated intentions of donors, create a pool of future assets in excess of \$49 million as of March 31, 2018. 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.

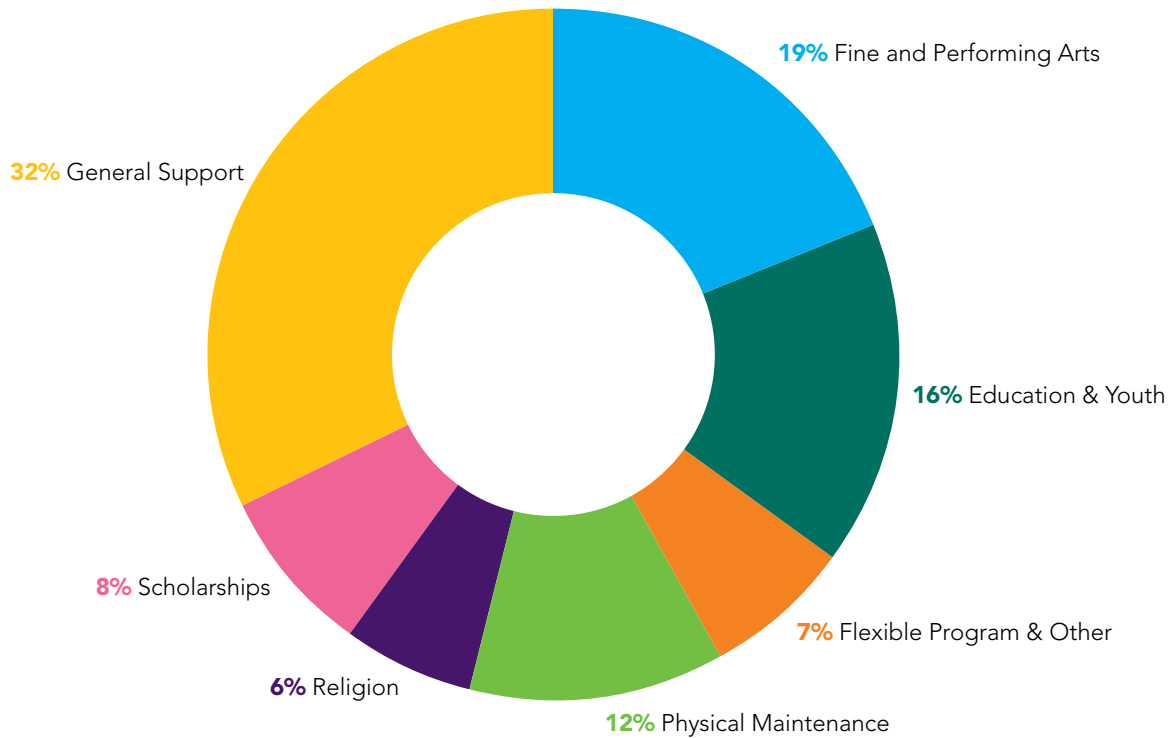


March 31, 2018

	Specified	Unspecified	Total
Unconditional contributions receivable	\$ 2,116,018	\$ 9,237,733	\$ 11,353,751
Conditional contributions receivable	25,219,174	13,288,804	38,507,978
	<u>\$ 27,335,192</u>	<u>\$ 22,526,537</u>	<u>\$ 49,861,729</u>

Endowment Net Assets

The net asset balance of the 738 active endowment funds as of March 31, 2018 was \$89 million. This balance represents the sum total of each endowment fund as of March 31, 2018. 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, 2018 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 Foundation utilizes the constant growth method for determining the annual direct support to the Institution, which involves increasing the distribution each year by an inflation factor and new gifts received. The amount to be distributed from temporarily restricted funds is determined annually by the donors and the Foundation and fiscal year 2018 includes the transfer of Miller Edison Cottage from the Foundation to the Institution.

	fiscal year 3/31/18	fiscal year 3/31/17
Direct Support to the Institution		
Support from Endowment	\$ 2,248,910	\$ 2,031,962
Support from Temporarily Restricted Funds	1,590,433	162,705
Annual Support from the Chautauqua Fund	4,884,685	3,838,586
	<u>\$ 8,724,028</u>	<u>\$ 6,033,253</u>
Indirect Support to the Institution		
Development Expense	\$ 1,531,382	\$ 1,342,908
Reimbursement by the Institution	(350,000)	(350,000)
	<u>\$ 1,181,382</u>	<u>\$ 992,908</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 \$94.7 million in invested assets, comprised of the following portfolios:

- 1) Endowment (\$89.7 million)
- 2) Temporarily restricted (\$1.5 million)
- 3) Pooled life income fund (\$3.3 million)
- 4) Custodial (\$.2 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.

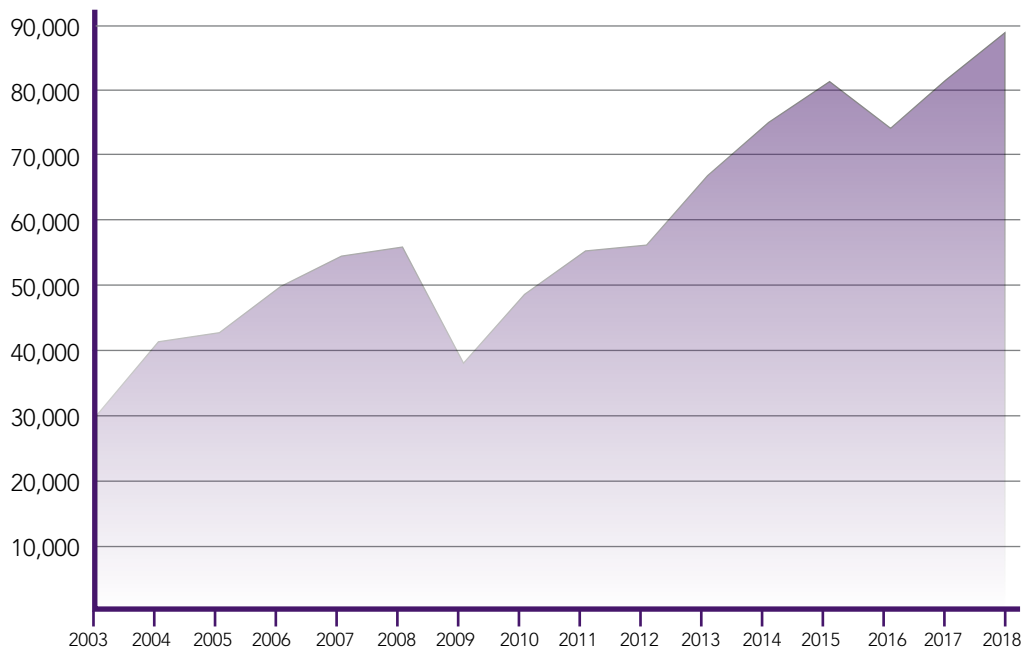
Hirtle, Callaghan & Co., LLC serves as the Foundation's Chief Investment Advisor and actively manages the majority of the endowment portfolio, the temporarily restricted funds, and the custodial funds. The remaining portion of the endowment fund was invested in two funds of hedge funds, managed by Blackstone Alternative Asset Management and Pointer Management, LLC. During the last quarter of the fiscal year the Foundation redeemed the full amount with Blackstone Alternative Asset Management and reinvested it with 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.
- 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, 2018, 31% of the PLIF assets were invested in equities, 59% 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 \$195,203 as of March 31, 2018. Assets are invested in a series of certificates of deposits.

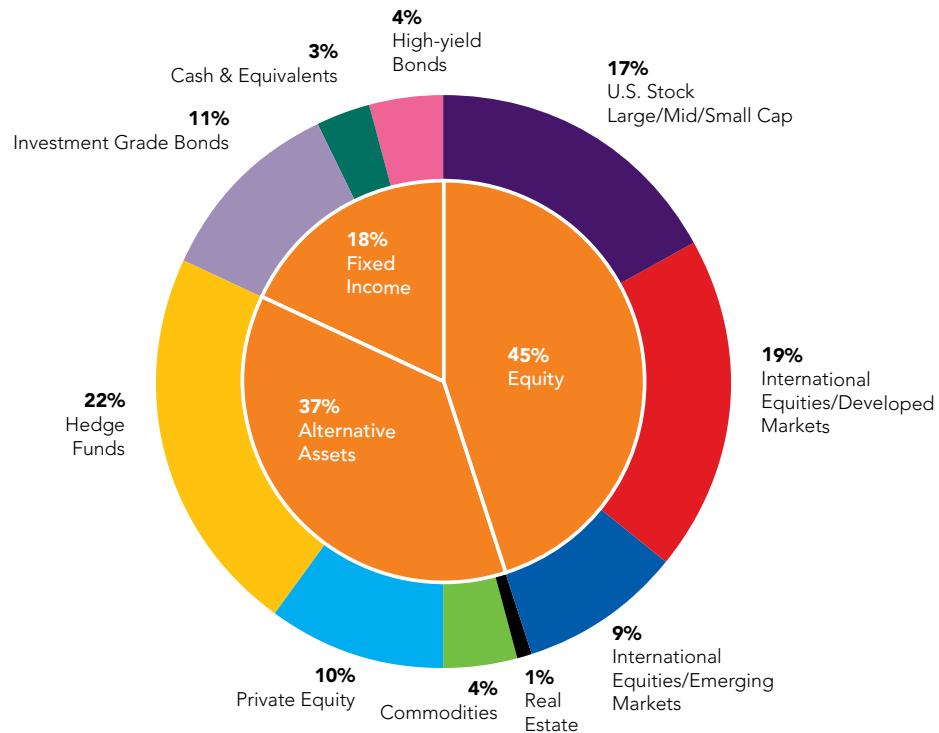
Endowment Investment Portfolio

This chart represents the endowment investment portfolio in thousands, which has grown by \$59.6 million over the past 15 years, from \$30.7 million as of March 31, 2003 to \$89.7 million as of March 31, 2018.



Endowment Asset Allocation

Total endowment portfolio market value was \$89.7 million and as of March 31, 2018 was allocated as shown in the accompanying table.

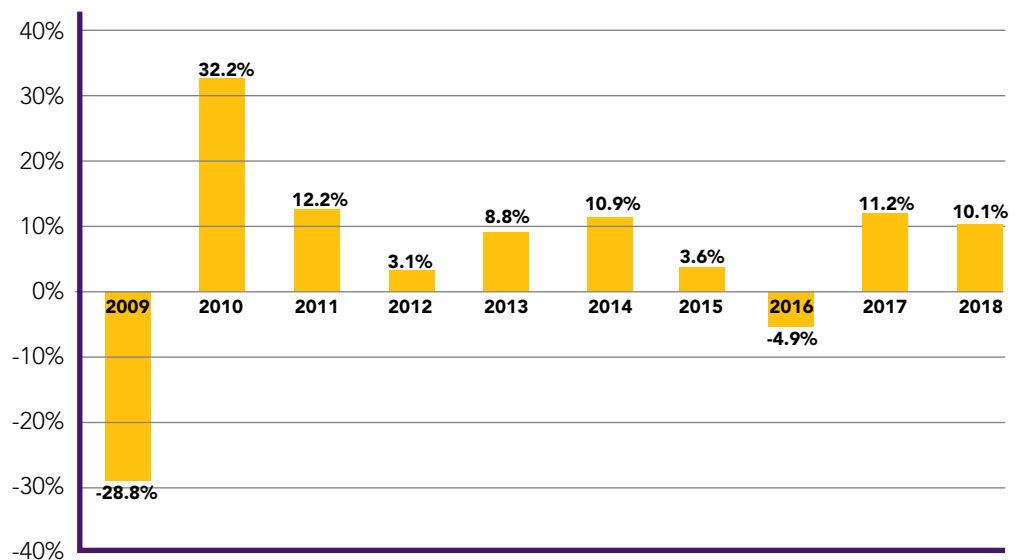


Annual Fiscal Year Performance

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, 2018 produced a gain of 10.1%. 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

	3/31/14	3/31/15	3/31/16	3/31/17	3/31/18
Total Return	6.2%	6.0%	3.7%	3.9%	4.7%
Benchmark	5.7%	5.3%	3.4%	3.2%	4.3%



The Audit Committee reviewed and discussed the audited financial statements for the fiscal year ended March 31, 2018 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, 2018 and 2017, 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, 2018 and 2017 and the changes in its net assets and cash flows for the years then ended, in accordance with accounting principles generally accepted in the United States of America.



June 18, 2018

STATEMENTS OF FINANCIAL POSITION

March 31,

Assets:

	<u>2018</u>	<u>2017</u>
Cash	\$ 1,720,567	\$ 822,757
Contributions receivable (Note 2)	5,208,808	5,026,346
Investments (Note 3)	91,682,240	84,023,661
Property and equipment, net (Note 4)	31,565	31,041
Other assets	390,738	1,855,748
	<u>\$ 99,033,918</u>	<u>\$ 91,759,553</u>

Liabilities and Net Assets:

Liabilities:

Payable to the Institution (Note 5)	\$ 2,821,243	\$ 2,543,560
Accounts payable and accrued expenses	352,274	464,148
Amounts held in custody for others (Note 6)	195,203	340,954
	<u>\$ 3,368,720</u>	<u>\$ 3,348,662</u>

Net Assets (Note 7):

Unrestricted	\$ 6,425,643	\$ 5,732,516
Temporarily restricted	15,913,293	12,715,451
Permanently restricted	73,326,262	69,962,924
	<u>\$ 95,665,198</u>	<u>\$ 88,410,891</u>
	<u>\$ 99,033,918</u>	<u>\$ 91,759,553</u>

See accompanying notes.

STATEMENTS OF ACTIVITIES

For the year ended March 31, 2018

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Revenues:				
Contributions:				
Cash received:				
Chautauqua Fund	\$ -	\$ 4,884,685	\$ -	\$ 4,884,685
Endowment	280,328	170,219	3,521,657	3,972,204
Other	-	162,257	-	162,257
Valuation adjustments and new pledges, net of collections	-	410,246	(158,319)	251,927
Total contributions	280,328	5,627,407	3,363,338	9,271,073
Interest and dividends	118,466	1,545,996	-	1,664,462
Net realized and unrealized gains	429,930	6,753,337	-	7,183,267
Total revenues	828,724	13,926,740	3,363,338	18,118,802
Expenses:				
Support to the Institution:				
Chautauqua Fund	4,884,685	-	-	4,884,685
Endowment direct support	2,248,910	-	-	2,248,910
Support from other funds	1,590,433	-	-	1,590,433
Development (Note 6)	1,181,382	-	-	1,181,382
General and administrative	959,085	-	-	959,085
Total expenses	10,864,495	-	-	10,864,495
Net assets released from restrictions	10,728,898	(10,728,898)	-	-
Change in net assets	693,127	3,197,842	3,363,338	7,254,307
Net assets - beginning	5,732,516	12,715,451	69,962,924	88,410,891
Net assets - ending	\$ 6,425,643	\$ 15,913,293	\$ 73,326,262	\$ 95,665,198

See accompanying notes.

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	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.

STATEMENTS OF CASH FLOWS

For the years ended March 31,

	2018	2017
Operating activities:		
Change in net assets	\$ 7,254,307	\$ 9,473,698
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Net realized and unrealized gains	(7,183,267)	(6,968,489)
Depreciation	11,075	9,539
Support to the Institution - property transfer	1,500,000	-
Changes in other operating assets and liabilities:		
Contributions receivable	(182,462)	(386,671)
Other assets	(34,990)	363,585
Payable to the Institution	277,683	(5,017,175)
Accounts payable and accrued expenses	(111,874)	17,427
Amounts held in custody for others	(145,751)	(145,226)
Net operating activities	<u>1,384,721</u>	<u>(2,653,312)</u>
Investing activities:		
Purchases of property and equipment	(11,599)	(3,542)
Purchases of investments	(10,930,799)	(8,331,550)
Proceeds from sales of investments	10,455,487	11,498,902
Net investing activities	<u>(486,911)</u>	<u>3,163,810</u>
Net change in cash	897,810	510,498
Cash - beginning	822,757	312,259
Cash - ending	<u>\$ 1,720,567</u>	<u>\$ 822,757</u>

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 18, 2018, 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 \$38,503,000 and \$37,691,000 at March 31, 2018 and 2017.

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:

	2018	2017
Pooled life income funds	\$ 3,292,845	\$ 3,396,010
Charitable remainder trusts	7,044,258	6,671,992
Unconditional promises to give	1,448,247	1,496,287
	<hr/> 11,785,350	<hr/> 11,564,289
Less discount	6,576,542	6,537,943
	<hr/> \$ 5,208,808	<hr/> \$ 5,026,346

Contributions receivable at March 31, 2018 are expected to be received over the periods shown below:

Less than one year	\$ 699,239
One through five years	743,532
Greater than five years	10,342,579
	<hr/> \$ 11,785,350

3. Investments:

	2018	2017
Marketable securities:		
Cash	\$ 3,378,727	\$ 4,330,141
Equities	44,876,734	42,611,457
Fixed income securities	14,042,821	10,910,357
Alternative investments	29,042,480	25,837,791
Other	341,478	333,915
	<u>\$ 91,682,240</u>	<u>\$ 84,023,661</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:

	2018	2017
Redeemable semiannually with with 105 days notice	\$ 11,099,617	\$ 9,823,523
Redeemable annually with 95 days notice	429,491	8,335,161
Illiquid with return of capital beginning 3 to 4 years from commitment date	8,923,547	7,679,107
Redeemable semiannually with 105 days notice after lock-up period of 2 years	8,589,825	-
	<u>\$ 29,042,480</u>	<u>\$ 25,837,791</u>

The Foundation has committed capital of approximately \$18,980,000 to private equity alternative investments. As of March 31, 2018, the remaining obligation under these commitments totaled approximately \$7,289,000.

Investment management fees of \$775,484 and \$590,301 for 2018 and 2017 are recorded in the statements of activities as follows:

	2018	2017
Fees netted against interest and dividends	\$ 196,933	\$ 165,915
General and administrative expense	578,551	424,386
	<u>\$ 775,484</u>	<u>\$ 590,301</u>

4. Property and equipment:

	2018	2017
Land	\$ 12,500	\$ 12,500
Building	152,275	152,275
Office equipment and furnishings	151,118	164,027
	<u>315,893</u>	<u>328,802</u>
Less accumulated depreciation	284,328	297,761
	<u>\$ 31,565</u>	<u>\$ 31,041</u>

5. Payable to the Institution:

Amounts payable at March 31:

	2018	2017
Income and principal	\$ 2,259,511	\$ 2,071,962
Income from prior periods	561,732	471,598
	<u>\$ 2,821,243</u>	<u>\$ 2,543,560</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 2018 and 2017 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 2018 and 2017 development expenses in the accompanying statements of financial position and activities, respectively.

The Foundation guarantees a promissory note payable by the Institution totaling \$222,780 at March 31, 2018. Amounts held by the Foundation on behalf of the Institution to help repay the note totaled \$195,203 and \$340,954 at March 31, 2018 and 2017.

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 is available until April 1, 2022 and has step down provisions to \$15,000,000 on April 1, 2020 and \$5,000,000 on April 1, 2021. The note bears interest at the LIBOR flex rate plus 1%, and contains a covenant requiring the Foundation to maintain a minimum balance in marketable securities or cash of \$25,000,000. Additionally, the Foundation provides a negative pledge on all of its assets, and the note is guaranteed by the Institution. During 2018, draws on the line totaled \$4,400,000. No borrowings on the arrangement were outstanding at March 31, 2018 and 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. Total interest recognized during the year ended March 31, 2018 was \$55,224.

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:

	2018	2017
Board-designated endowments	\$ 5,508,969	\$ 5,002,841
Unrestricted gifts	929,355	919,966
Underwater funds	(12,681)	(190,291)
	<u>\$ 6,425,643</u>	<u>\$ 5,732,516</u>

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

	2018	2017
Gains - specified endowments	\$ 8,973,569	\$ 6,136,992
Gains - unspecified endowments	2,945,869	1,883,978
Term endowments	3,186,866	2,865,876
Temporarily restricted gifts	806,989	1,828,605
	<u>\$ 15,913,293</u>	<u>\$ 12,715,451</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:

	2018	2017
Specified endowments	\$ 51,438,907	\$ 48,656,810
Unspecified endowments	21,887,355	21,306,114
	<u>\$ 73,326,262</u>	<u>\$ 69,962,924</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 \$91,000 and \$77,000 for the years ended March 31, 2018 and 2017.

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, 2018 and 2017 were determined based on quoted prices in active markets.

Note 10 continued on next page.

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, 2018 and 2017 is as follows:

2018	Unrestricted (Board-designated)	Temporarily Restricted	Permanently Restricted	Total
Endowment assets - beginning of year	\$ 5,002,841	\$ 10,886,846	\$ 69,962,924	\$ 85,852,611
Investment income:				
Interest and dividends	157,056	1,536,428	-	1,693,484
Net gains	444,057	6,744,961	-	7,189,018
Total investment income	601,113	8,281,389	-	8,882,502
Contributions	280,327	178,813	3,363,338	3,822,478
Appropriated	(375,312)	(4,240,744)	-	(4,616,056)
Endowment assets - end of year	\$ 5,508,969	\$ 15,106,304	\$ 73,326,262	\$ 93,941,535

2017	Unrestricted (Board-designated)	Temporarily Restricted	Permanently Restricted	Total
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

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, 2018 and 2017 and have issued our report thereon dated June 18, 2018 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, 2018 and 2017 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.

Lyndon & McConaich, LLP

June 18, 2018

For the years ended March 31, **2018** **2017**

Support to the Institution:

Chautauqua Fund \$ 4,884,685 \$ 3,838,586

Endowment direct support:

Building, structures and grounds	\$ 430,446	\$ 246,964
General operations	48,243	481,235
Lectureship and CLSC	692,451	495,820
Performing arts	591,331	435,217
Religion	202,165	159,660
Scholarship and youth	284,274	213,066
	<u>\$ 2,248,910</u>	<u>\$ 2,031,962</u>

Support from other funds:

Capital	\$ 1,500,000	\$ 62,293
General operations	52,081	75,879
Lectureship and CLSC	33,917	20,158
Scholarship and youth	4,435	4,375
	<u>\$ 1,590,433</u>	<u>\$ 162,705</u>

Development:

Salaries and benefits	\$ 1,034,006	\$ 954,908
Promotion and communications	60,635	68,610
Office	54,325	48,357
Travel and hospitality	192,720	143,429
Professional and consulting	125,306	85,833
Equipment maintenance and repairs	54,121	33,433
Education	10,269	8,338
Reimbursement by the Institution	(350,000)	(350,000)
	<u>\$ 1,181,382</u>	<u>\$ 992,908</u>

General and administrative:

Investment management	\$ 578,551	\$ 424,386
Salaries and benefits	276,737	258,739
Office	8,805	12,736
Travel and hospitality	34,448	48,542
Professional and consulting	40,159	54,497
Equipment maintenance and repairs	18,920	65,841
Education	1,465	1,823
	<u>\$ 959,085</u>	<u>\$ 866,564</u>

Total expenses \$ 10,864,495 \$ 7,892,725

ENDOWMENT FUNDS

UNSPECIFIED FUNDS

\$27,950,826 Assets

\$1,023,926* Support to the Institution

* Includes support provided to the Institution for development services.

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

- Paul M. Alexander Fund
Dorothy L. Anderson Endowment for Chautauqua
- Mary Apple Fund
- **Katherine G. Bailey Fund**
Arthur S. & Barbara F. Banner Endowment for Chautauqua
Robert and Je'Anne Bargar Endowment
Zoe and Ken Barley Endowment
Beatrice B. Bates Fund
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
Charles and Rebecca Denton Endowment for Chautauqua
Dietrich Family Endowment at Chautauqua
Martha T. and Morgan O. Doolittle Fund
Lora Lee and Bob Duncan Endowment
- Ann O. Edison Endowment
Albert C. Elser II Fund
Cordelia C. Ensign Fund
James E. Erickson Fund
Helen C. Estabrook Fund
Agnes H. and Hal A. Fausnaugh Fund
Fetterolf Family Fund
George L. Follansbee, Jr. and Gay E. Didget Endowment
for Chautauqua
James L. Flynn and Shirley Mix Flynn Endowment for Chautauqua
Gelb Family Endowment for Chautauqua
William R. and Betsy Callicott Goodell Endowment
Kathleen M. and Donald C. Greenhouse Endowment
for Chautauqua
Jean Edgcombe Groff Endowment for Chautauqua
Groninger Family Fund
Habenicht Family Fund
Felicia Grace Hall Fund
Tirzah H. Hall Fund
- Sarah R. Hankey Fund for Chautauqua
Diana and Samuel Harbison Endowment
Walter O. and Joan S. Harf Fund
Heber R. Harper Fund
Drs. Thomas J. and Patricia H. Hasbach Endowment for Chautauqua
Eleanor McKnight Haupt Endowment for Chautauqua
Lisa Heinz Endowment for Chautauqua
Dorothy S. and William F. Hill, II Endowment for Chautauqua
Holden Family Fund
The Burritt and Joanne Hubbard Family Fund
- Margaret A. Hukill Endowment for Chautauqua
Charles R. Hunter, Jr. Fund
Esther M. Huntoon Fund
Verna Jackson Memorial Endowment for Chautauqua
James Family Fund
Katherine King Karlake 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
 Frances M. Miller Endowment for Chautauqua
 Richard H. Miller Fund
 Dawson E. and 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
 Donald R. Pembridge and Rosalie H. Pembridge Endowment for Chautauqua
 Margaret Penn Fund
 Sheila Penrose and Ernest Mahaffey Endowment for Chautauqua
 Steven W. and Barbara P. Percy Endowment for Chautauqua
 Helen Pickup-Hyman Fund
 Mary Ellen Pindyck Fund
 Sam and Petey Tinkham Price Family Fund
 • Evelyn Joyce Ramsdell Fund
 Mary Oram Reading Fund
 • Agnes H. Reigart Fund
 Renjilian Family Fund
 Elaine Y. Rieser Endowment for Chautauqua
 William Rittman Fund
 Mary Ritts Endowment
 Walter Roberts Fund
 David M. and Sarah A. Rosen Endowment for Chautauqua
 • Stephanie Rosenblatt Fund
 • Doris H. Ruslink Fund
 Harper G. and Blanche Billings Rusterholtz Fund
 • Herbert B. Sachse Fund
 Howie and Bobby Schiller Endowment for Future Generations of Chautauquans
 Newton B. Schott, Jr. and Antoinette L. LeQuire-Schott Endowment
 Barbara and John Schubert Endowment Fund
 Dr. O. Peter Schumacher Fund
 • Helene J. Schwartz Endowment for Chautauqua
 Mary Jo Schweizer Endowment for Chautauqua
 Jo and Bill Selnick Fund
 Emma O. and H. Parker Sharp Fund
 Jane R. and Walter C. Shaw, Jr. Fund
 Ralph C. Sheldon, Jr. Fund
 • Dorothy E. Shepherd Fund
 Allen and Elaine Short Endowment for Chautauqua
 Bert W. and Joanne R. Simons Endowment
 Elizabeth M. Smith Memorial Endowment for Chautauqua
 J. Vance Smith and Robert M. Smith Fund
 George T. and Margaret D. Snyder Endowment for Chautauqua
 Nancy Coburn Snyder Endowment Fund
 Thomas H. and Joan Stevens Family Endowment for Chautauqua
 • Betty P. and J. Bruce Stromgren Fund
 Ann H. and Daniel F. Sullivan Endowment for Chautauqua
 The Robert C. and Patricia D. Switzer Family Fund
 Tate Family Fund
 Eleanor M. Thomas Fund
 The Susan and John Turben Foundation Endowment for Chautauqua
 Joseph & Elizabeth Verlie Endowment
 Carl A. and Mary Louise Viehe Family Endowment
 Debby and Dick Wade Endowment for Chautauqua
 Nina and Norman Wain Family Endowment for Chautauqua
 Carol and Bill Ward Endowment for Chautauqua
 Evelyn Wargo Endowment
 Charles and Lois Weaver Fund
 Nina T. Wensley Fund
 Helen N. White Fund
 Robert O. Wilder Family Fund
 • The Mary S. Wilsdon Fund for Chautauqua
 Betty Offutt Wood and BRAVAS Endowment for Chautauqua
 Henry L. Wood Fund
 John B. Yoder Endowment for Chautauqua
 Robert and Virginia Young
 The Deborah and Allen Zaretsky Fund
 Stephen J. Zenczak and Patricia E. Feighan Endowment for Chautauqua
 General Endowment Fund



Every Gift Matters:

KAY LOGAN CHAMBER MUSIC ENDOWMENT

Kay Logan, who passed away in June 2016, will not be forgotten at Chautauqua. A staunch supporter of the arts, Kay's legacy is evident in the impact of her and her husband Harry's philanthropy, which funded numerous scholarships as well as the Logan Chamber Music Series, the David Efron Conducting Fellowship, the Chautauqua Artist Teacher Award for the School of Dance and the Mischakoff/Taylor Concertmaster Chair Fund.

Kay's passion for chamber music — as integral to music education for artists and for the appreciation of music by the public — continues to inspire others to give. Bruce McWilliams and Sarah Hagen McWilliams have enabled Chautauqua to both sustain and expand its chamber music offerings through their generosity and Kay's close friend, Suzanne Shull, has established an endowment for chamber music in Kay's name. Suzanne first came to Chautauqua after an invitation from Kay and felt deeply that her friend's contributions to chamber music on the grounds should be permanently recognized.

The Kay Logan Chamber Music Endowment Fund will support the chamber music program at Chautauqua and help enable Kay's beloved art form to continue to educate, inspire and delight musicians and community members alike.

Kay studied flute at the Chautauqua School of Music during her college years as a scholarship recipient and always credited this experience for setting her on her path for life. Kay was the principal flutist for the Columbus Symphony Orchestra for 15 years. She also performed with the Chautauqua Symphony Orchestra and the Chautauqua Community Band, among other groups, throughout her lifetime.

Gifts of all amounts can be made to the Kay Logan Chamber Music Endowment in support of an annual chamber music program.

ENDOWMENT FUNDS (CONT.)

SPECIFIED FUNDS

\$61,973,010 Assets

\$2,143,308 Support to the Institution

New funds are designated in orange.

PHYSICAL MAINTENANCE FUNDS

\$10,899,458 Assets

\$380,361 Support to the Institution

Buildings and Structures

\$9,172,029 Assets

\$318,840 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
Jackie Lynch Studio Endowment

The Massey Memorial Organ Fund
The McClure Shuffleboard Fund
McKnight Hall Maintenance Endowment
Miller Edison Cottage 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

\$1,175,894 Assets

\$40,721 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

ENDOWMENT FUNDS (CONT.)

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

\$551,535 Assets

\$20,800 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

\$12,884,938 Assets

\$455,211 Support to the Institution

Lectureships

\$9,436,683 Assets

\$329,684 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 Barendfeld 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

\$1,227,844 Assets

\$44,911 Support to the Institution

The Baird-Fuller Memorial Fund

Caroline Roberts Barnum and Julianne Barnum Follansbee Fund
 The Alice M. Bentley CLSC Memorial Fund
 John H. Bliss Memorial Fund
 Lowell & Frances Hyams Brentano Library Fund
 Chautauqua Literary Arts Endowment
 Chautauqua Prize Endowment Fund
 C.L.S.C. Class of 1940 Endowment Fund
 C.L.S.C. Class of 1948 Endowment Fund
 Court Family Internship Endowment
 The Louise Shaw Van Kirk Dill Fund
 The Paul and Mary Jean 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

\$617,536 Assets

\$22,489 Support to the Institution

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

Other

\$1,602,875 Assets

\$58,127 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

\$17,026,802 Assets

\$603,186 Support to the Institution

General

\$3,228,581 Assets

\$115,324 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

\$4,370,973 Assets

\$146,524 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

ENDOWMENT FUNDS (CONT.)

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

\$4,925,184 Assets

\$177,884 Support to the Institution

Clement and Karen Arrison Endowment for Classical Violin
Maggie Bella Symphony Orchestra Endowment Fund
The Boyle Family Fund for the Chautauqua Symphony Orchestra
The Mary Peterson Chalfant Fund for the Chautauqua Symphony Orchestra
Chautauqua Symphony Orchestra Endowment Fund
The Carl and Lee Chaverin Fund
Shirley A. and Arthur R. Duffy Endowment for Classical Guitar
Heitzenrater Family Chautauqua Symphony Orchestra Fund
The William M. Kinley Fund for the Chautauqua Symphony Orchestra
William D. Kuhns Fund for General Music Purposes of Chautauqua Institution
The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra
Helen T. Logan Fund for the Chautauqua Symphony Orchestra
Mr. & Mrs. Sam A. Miller and Mr. & Mrs. Edward S. Babcox Memorial Fund
The Mischakoff/Taylor Concertmaster Chair Fund
Music School Festival Orchestra Fund
Frances and George Newman Endowment for the Chautauqua Symphony Orchestra
Margaret Miller Newman Fund for the Chautauqua Symphony Orchestra
The David B. and Barbara Barrett Orr Music Fund
Av and Janet Posner Fund for the Chautauqua Symphony Orchestra
The Reinberger Fund for the Performing Arts
The Gertrude Aldredge Shelburne Fund

The Dr. James and Mary Anne Evans Singleton Fund for the Chautauqua Symphony Orchestra
Symphony Patron Endowment Fund for the Chautauqua Symphony Orchestra
The Trustees' Fund for the Chautauqua Symphony Orchestra
Rita and Dunbar VanDerveer Symphony Principal Chair for Flute
Mary E. Whitaker Symphony Endowment Fund
The Wilder Family Fund for the Chautauqua Symphony Orchestra
Nora J. Williams Symphony Fund
Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra

Theater

\$1,450,928 Assets

\$52,949 Support to the Institution

The Arnold and Jill Bellowe Fund for Theater
The Nancy E. Brewer Fund for Theater
Chautauqua Theater Fund
Court Family Endowment
The Crockett Family Fund for Theater
The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming
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

\$1,238,309 Assets

\$46,086 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

\$1,812,827 Assets

\$64,419 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

\$5,764,839 Assets

\$200,454 Support to the Institution

General

\$1,409,776 Assets

\$51,800 Support to the Institution

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

Chaplaincies

\$1,107,799 Assets

\$42,036 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

\$1,397,619 Assets

\$45,079 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

\$1,849,645 Assets

\$61,539 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

\$7,113,997 Assets

\$247,755 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
Barton Family Scholarship
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
Bonfoux/McBride Dance Scholarship
June and Albert Bonyor Scholarship Fund for Ballet
Alexander W. Bouchal Memorial Scholarship
Ward T. Bower Memorial Scholarship

ENDOWMENT FUNDS (CONT.)

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
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 Pepper 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
Soulful Bliss 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 Karlslake White School of Music Scholarship
The Drs. Frits & Corrie Wiebenga Scholarship Fund
The Rachel Wilder and Phil Lerman Scholarship
Victoria Willen Scholarship Fund for the Arts
The Mark W. Williams Scholarship
Mary Chenoweth Wright Scholarship Endowment
The Harriet G. Yanes Dance Scholarship
The John B. Yoder Music Scholarship
Chadwick Young Scholarship

FLEXIBLE PROGRAM FUNDS

\$4,720,037 Assets

\$170,381 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

\$3,562,939 Assets

\$85,960 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
[David and Joan Lincoln Family Fund for Applied Ethics](#)
[Kay Logan Endowment for Chamber Music](#)
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

\$214,811 Assets

\$76,144 Support to the Institution

The Wendy Cohen Fund
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



Every Gift Matters:

SYDELLE SONKIN AND HERB SIEGEL ARTISTIC DIRECTOR OF THE VISUAL ARTS

As the fiscal year closed, Deborah Sunya Moore, vice president of performing and visual arts, was actively leading a search with the assistance of an advisory group comprised of some of Chautauqua's most ardent supporters of the visual arts, in concert with a panel of national advisors, to engage a new Artistic Director of the Visual Arts at Chautauqua Institution (VACI). As the search progressed, her work was invigorated by news of the intention of Herb Siegel and Sydelle Sonkin to make a gift to the Foundation to endow the first chair in the Institution's history for one of its artistic directors.

As Deborah conducted a national search to replace VACI's Artistic Director Don Kimes and Managing Director Lois Jubeck, who had announced that the 2018 season would be their last in their respective positions after three-plus decades leading the program, the news of Herb and Sydelle's gift provided new allure to the position. They understood that recruiting someone into an endowed chair demonstrated the value the Chautauqua community places on the visual arts and the Institution's own commitment to the presence of the visual arts on the grounds.

On July 27, 2018, the Institution named Sharon Loudon as the incoming Sydelle Sonkin and Herb Siegel Chair for the Artistic Director of the Visual Arts to replace Don Kimes who had been appointed to the Chair subsequent to the announcement of the gift. Building on Don's legacy, Sharon will oversee a dynamic department composed of the Chautauqua School of Art, Strohl and Fowler-Kellogg Art Centers, an artist lecture series and growing education and community engagement programs.

Herb and Sydelle have each always been interested in art. After they met and decided to form a loving union, they needed to combine their art collections. Coming to Chautauqua only furthered their mutual interest and passion in art and the art community, including adding to their combined art collection.

Their enjoyment from being active patrons of the visual arts and their desire to share similar enjoyment with more Chautauquans prompted their gift. They recognized that by providing additional resources to help the Institution recruit and retain the strongest leadership — a director with a national reputation for artistic vision and creativity — would help build Chautauqua's stature in the art world.

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MILLER EDISON COTTAGE AND GARDENS

The Miller Edison Cottage, the only building on the Chautauqua grounds separately designated as a National Historic Landmark by the National Park Service, was commissioned by Chautauqua co-founder Lewis Miller in 1875 and installed prior to the Assembly's second session. His daughter, Mina, and her husband, the inventor Thomas Edison, later occupied and owned the cottage. In 2015, the Institution purchased the cottage from Ted and Kim Arnn, the great-grandchildren of Lewis Miller, after receiving a gift from Chautauquan Tom Hagen to do so. Hagen also provided a challenge matching grant of \$150,000 for endowment that was fulfilled in 2017. Today, an endowment of \$358,000 exists for the future maintenance and preservation of the cottage, which had been lovingly cared for by the Miller family descendants for 140 years.

With the input of historic preservation architect Jeff Kidder, AIA, a partner at Kidder Wachter Architecture & Design in Erie, Pennsylvania, a complete study of the cottage was undertaken after its transfer to the Foundation. The report recommended a series of relatively small structural and safety issues to be addressed for the cottage's more public use.

In addition, the Foundation hired a leading expert on the gardens of Ellen Biddle Shipman, a legendary landscape designer in the 1920's whom Mina Miller Edison hired to design the gardens for the cottage after her 1924 renovation. Using the report of Patricia O'Donnell, principal of Heritage Landscapes LLC, Preservation Landscape Architects & Planners, Chautauqua's supervisor of gardens and landscapes, Betsy Burgeson, has developed a plan for reinvigorating a diversity of perennials, shrubs and trees, as well as restoring pathways, a stone terrace, small pool and fountain.

This past July 2018, the Foundation, with the leadership of Karen Goodell, Bob Jeffrey and Cathy Bonner, hosted a benefit event in Miller Park where over two hundred Chautauquans were treated to a tour of the cottage and gardens led by historical impersonators representing Lewis and Mary Valinda Miller and Mina and Thomas Edison. Guests also learned more about the current funding needs for restoring the cottage and its gardens.

In conjunction with the benefit, Chautauquans generously pledged all the funds necessary to fulfill the garden's capital needs as well as many of the improvements needed in the cottage. Importantly, the community also initiated a fund to endow the future maintenance of the gardens. This endowment has reached approximately one-third of its ultimate goal. Those who would like to add to this endowment may contact the office of the Foundation.

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 Susan O. Wood
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 Caroline Young
 Robert and Donna Zellers
 Stephen Zenczak and Patricia
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2018 MEMORIAL GIFTS

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

Barbara Buerger Abernathy
SueAnn Wooster Ames
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Stephen C. Brown
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Judy Jones McMillin
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Rosalie and Donald
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Virginia Spivak
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Betty A. Stoker
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Stricklane
Karen Turcotte
Peggy Ulasewicz
Ernest "Mike" Walker
Mary Whitaker
Nancy Hyde Wilbur
Tom Wineman
Betty O. Wood
Donald Zarou

2018 HONORARY GIFTS

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

Morton I. Abramson
Stephen C. Ames
Tom and Jane Becker
Susan and Henry Sobel
Barbara A. Painkin Brandwein
Joan Brown Campbell and
Albert Pennybacker
The Cunningham Family
Joe and Toni Goldfarb
Alfred E. and Judith H.
Goldman
Karen L. and Richard P.
Heitzenrater
Susan Helm
Jared Jacobsen
Bob Jeffrey
Kathryn Levy
Wendy Limberg
Rev. Dr. Ross Mackenzie
Deborah Sunya Moore
Lenelle Morse
Michael and Sydney Mullen Jr.

Lee Robinson
Howie and Barbara Schiller
George Sherwin
Suzanne Shull
Ann Slonaker
Mabe Sorensen
Rabbi Samuel and Lynn Stahl
Rita and Dunbar VanDerveer
Subagh Khalsa Winkelstern
Richard O. Wood
Susan Wood



Every Gift Matters:

DAVID AND JOAN LINCOLN FAMILY FUND FOR APPLIED ETHICS

Since its founding in 1874, Chautauqua has been recognized as a forum in which the value dimensions of current issues have been explored in a variety of programming formats. In the midst of society's transition from an industrial base to an information base, Chautauqua's mission has been advanced substantially by helping to satisfy the desire for moral and intellectual growth by people who, often overwhelmed by the fragmentary and isolating forces of information overload and rapid change, are searching for the best impulses of individual and community values.

In 1997, Chautauqua Institution launched a new initiative in applied ethics, the funding for which was provided by David Lincoln. In the 22 years preceding his death in the spring of 2018, David and his wife, Joan, contributed to the Institution nearly \$1.5 million dollars in outright gifts to underwrite lectures focused on making the right decisions in everyday life. During these years, continuing into the 2018 season, the Lincoln Program in Applied Ethics grew to include a collaboration with Arizona State University (ASU) where the Lincoln family had established the Lincoln Center for Applied Ethics and funded professors in ethics across the university. Additionally, the Lincoln Program has been experienced within the Interfaith Lecture Series as well as the morning lecture series, master classes and podcasts.

David consistently referred to the Golden Rule when talking about ethics: just do unto others that you would have them do to you. That philosophy guided the way he led his personal life and many business ventures and has been a central characteristic of the company David's father founded, and in which David was involved most of his adult life, Lincoln Electric.

David began coming to Chautauqua as a small child. His mother's engagement with the Institution was extensive including years spent as a Trustee. Lincoln Park is named for her. The funding for the construction of Lincoln Dorm was provided by David's mother in memory of David's father. David returned to Chautauqua with his young family though such trips became more challenging after the family's move to Phoenix, Arizona.

David's passion for fostering in society his commitment to ethical behavior led to a deeper engagement, indeed re-engagement, with the Institution. The Institution became a voice, as did ASU and later Claremont Lincoln University, for educating young and old about the value of ethics.

Before David's death, he decided to make a series of major gifts to the three institutions through which his advocacy for ethics was being expressed. His gift of nearly \$1.1 million dollars to the Foundation established the David and Joan Lincoln Family Fund for Applied Ethics as a permanent endowment that will carry on the annual investment David and his family made to support the exploration of ethical decision-making. The applied ethics program, along with the Lincolns' support of the visual arts, will continue to honor the lasting legacies David and Joan established at Chautauqua.

OFFICERS, DIRECTORS AND STAFF

Directors

Term Expires

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Cathy Bonner of Austin, Texas - <i>ex officio</i> • 1, 2, 3, 4, 5, 6, 7	2021
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<i>Chair, Board of Directors</i>	
Andrew L. Camden of Grosse Pointe, Michigan • 3, 5	2021
<i>Chair, Investment Committee</i>	
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Lauren Rich Fine of Shaker Heights, Ohio • 5, 7	2020
Charles S. Gamble of Dunedin, Florida • 4, 5	2020
Karen J. Goodell of New York, New York • 2, 3, 6	2021
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William R. Goodell of San Francisco, California • 4, 5	2018
Michael E. Hill of Washington, D.C. • 3	ii
John Houghton of Buffalo, New York • 2, 4, 6	2022 ⁱ
William M. James of New York, New York • 3, 6	2020
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John A. Milos of Orange Village, Ohio • 2, 7	2019 ⁱ
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Anne Odland of Washington, D.C. • 1, 3	2018
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M. Timothy Renjilian of Atlanta, Georgia • 1, 5	2019
Sheila Schroeder of San Francisco, California • 4, 5	2021
George T. Snyder of Pittsburgh, Pennsylvania • 3, 4, 7	2021
<i>Chair, Personnel Committee</i>	
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Stephen J. Zenczak of Gates Mills, Ohio • 3, 4	2019
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| 1 - Audit Committee | 5 - Investment Committee |
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| 3 - Executive Committee | 7 - Personnel Committee |
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ⁱ Coincides with term on the Chautauqua Institution's Board of Trustees

ii Coincides with term as President of Chautauqua Institution

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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
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David L. Starr • August 1937 to 1951
Mrs. Livingston Hunter • August 1939 to 1942
Mrs. Dorothy Smith • August 1943 to 1950
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Harold F. Reed • August 1951 to August 1971
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Walter C. Shaw, Jr. • August 1956 to August 1974
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Daniel L. Bratton • December 1983 to December 2000
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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
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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
Thomas B. Hagen • June 2011 to August 2017
John S. Kobacker • August 2011 to September 2016
Laura P. Currie • June 2012 to August 2017
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Former Board Leadership

Walter Roberts
August 1937 to August 1957

John D. Hamilton
August 1967 to August 1971

William F. Hill, II
August 1996 to August 2002

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

One Ames Avenue
P.O. Box 28
716.357.6220 • 716.357.4023 (fax)
foundation@chq.org
www.chautauquafoundation.org

2019 Annual Membership Meeting
Saturday, August 17 • 9 a.m.