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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.

STATEMENT OF PURPOSE

Article II, Corporate Charter May 14, 1937

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

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

MISSION STATEMENT

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VI. To do all lawful things proper or needful to accomplish the purposes herein before expressed.
At the time of last year’s message, roughly five months into the pandemic, the resilience of Chautauqua was clearly on display. The value of the endowment had rebounded strongly from its initial COVID-related plunge. The Institution developed and launched the online CHQ Assembly platforms with astonishing speed, maintaining connection with our community and faithfulness to our mission. Even with no in-person programming, many Chautauquans returned to the grounds and were grateful to experience the Institution, and the lovely county in which it resides, in different but no less fulfilling ways. As the season drew to a close, the planning for the 2021 season began, with renewed energy around our strategic plan and excitement about the possibilities created by CHQ Assembly, yet tempered by the ongoing financial and programmatic uncertainty created by the pandemic.

As the Institution began carefully developing multiple budget scenarios and contingency plans for 2021, the Foundation remained closely involved, ready and eager to provide support. We worked together to explore a variety of ways in which the Foundation could assist the Institution, helping to bridge cash-flow timing issues, and coordinating with the Institution’s leaders to identify ways to maximize the use of available endowment payout funds in a manner consistent with donor wishes and prudent fiduciary management. This work continues as we look toward 2022, and it has further strengthened the ties between the Institution and Foundation at both the staff and board levels.

Within the Foundation, we have pushed forward with initiatives designed to better meet the needs and expectations of our donors. For example, the unusual nature of programming in 2020 led us to perform additional steps to ensure that our payout of restricted funds was consistent with donor intentions. This included a comprehensive re-review of all our donor agreements, resulting in an easy-to-use database of relevant donor restrictions; heightened board scrutiny of payout determinations; and commissioning our outside auditors to conduct enhanced procedures to confirm that our distribution of funds was appropriate. In addition, we expanded our communications and increased our accessibility in a variety of ways, including two “Open House” sessions conducted during the 2021 season. Further, we implemented new software to help produce our annual endowment fund reports, allowing us to provide timely and clear information to donors in an environmentally friendly manner, and setting the stage for more frequent interim and ad hoc reporting in the future.

We have also invested considerable time into analyzing the impact of endowment at Chautauqua, setting the stage for more strategic conversations about endowment in the future. At the same time, we have worked to identify new talent for our Board, preparing us to help expand the role that the endowment can play. We have an outstanding slate of new directors ready to come aboard in 2021, and we’re planning to bring on additional directors in 2022 to restore the board to full strength with a cohort of leaders specifically tailored to Chautauqua’s emerging needs and challenges.

All of this work is being done with a clear-eyed view of the role endowment can and should serve in supporting the Institution in perpetuity. Our endowment must be large enough to ensure that Chautauqua’s core remains secure, providing a solid launching pad for growing impact and influence. It also must be able to adapt with the needs of the time. The last year-and-a-half brought clarity to both of those propositions, highlighting the critical role the endowment plays in sustaining the Institution, and underscoring the incredible value and utility of unspecified and minimally restricted endowment funds. As you consider the role of your existing funds and your plans for future gifts, we ask that you keep both of those points in mind. In concert with that request, we pledge to continue our work to ensure that the Foundation staff and board warrant your trust as thoughtful and effective stewards.

With the return of in-person programming in 2021, it has been a joy seeing many of you back on the grounds and having the opportunity to re-engage with you. Please know that we are available to you — both during the season and year-round — to answer questions, take suggestions, or just to enjoy together our shared love of this glorious place. Until then, we wish you good health and, with deep sincerity, thank you for your trust and for your generous support of Chautauqua’s endowment.

Sincerely,

M. Timothy Renjilian
Chair, Board of Directors

Deborah E. Moore, CPA
Executive Director
Financial Overview

It was a strong financial year for Chautauqua Foundation. We received $4.2 million in endowment gifts, $13.8 million in net investment income was earned, and $4.45 million of endowment payout was made available to Chautauqua Institution. Net assets increased by $12.8 million to over $120 million.

Chautauqua’s planned giving program provided 59% of endowment gifts received in 2020 and represented 59% of the endowment commitments received in 2020. Over a 5-year time period, 29% of the endowment gifts received were realized planned gifts and 52% of the endowment commitments were planned gifts.

The net investment income included $13.2 million of net realized and unrealized gains and the net annual return was 14.1%, which exceeded the benchmark of 12.0%. This would have been strong performance in any year but was especially strong after the market correction in March 2020.

Although the Institution was not able to take full advantage of the endowment payout available in 2020 due to program changes as a result of the pandemic, $3.55 million was paid to the Institution after careful review of the expenditures to ensure the individual restrictions for each endowment fund were satisfied.

Endowment Cash Received

Over the past five fiscal periods, cash received from outright gifts and realized planned gifts totaled $20.6 million.

Cumulative percentage over five fiscal periods.

Endowment Commitments

Over the past five fiscal periods, pledge and planned gift commitments totaled $30.7 million.

Cumulative percentage over five fiscal periods.
Future Commitments to Endowment

The Foundation has received both conditional and unconditional future commitments which, when combined with the previously stated intentions of donors total $54.7 million as of December 31, 2020. The unconditional commitments have a total gross value of $13.6 million and are recorded in the financial statements at net discounted values of $2.3 million for cash pledges and $4.1 million for split-interest agreements. The split interest agreements include gifts to the pooled life income fund, irrevocable trusts, and the gift annuity program held at the National Gift Annuity Foundation (NGAF). The conditional commitments are not recorded in the financial statements and have a total gross value of $41 million, which represents bequests, revocable trusts, and beneficial interests.

This chart represents $54.7 million of future commitments to endowment by type of commitment.

The total future commitments to endowment was $54.7 million as December 31, 2020. Support from specified commitments is restricted in use on a fund by fund basis, while unspecified commitments support the general operations of the Institution.

![Chart showing future commitments to endowment by type]

- **Charitable Gift Annuities**: >1%
- **4% Endowment Pledges**: 4%
- **Irrevocable Trusts**: 15%
- **Pooled Life Income Fund**: 6%
- **Revocable Trusts**: 13%
- **Beneficial Interests**: 13%
- **Bequests**: 49%

![Bar chart showing future commitments]

- **3/31/17**: Unspecified Commitments 30%, Specified Commitments 70%
- **3/31/18**: Unspecified Commitments 28%, Specified Commitments 72%
- **3/31/19**: Unspecified Commitments 26%, Specified Commitments 74%
- **12/31/19**: Unspecified Commitments 24%, Specified Commitments 76%
- **12/31/20**: Unspecified Commitments 22%, Specified Commitments 78%
FINANCIAL REPORT (CON’T)

Foundation Net Assets
During the year ended December 31, 2020, the net assets of the Foundation increased by $12.8 million to reach $120.4 million. Net assets are comprised of gifts already received and the net appreciation of those gifts, as well as the net discounted value of pledges and split-interest agreements.

Number of Active Endowment Funds

<table>
<thead>
<tr>
<th></th>
<th>3/31/17</th>
<th>3/31/18</th>
<th>3/31/19</th>
<th>12/31/19</th>
<th>12/31/20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Funds</td>
<td>714</td>
<td>738</td>
<td>743</td>
<td>765</td>
<td>775</td>
</tr>
</tbody>
</table>

Endowment Net Assets by Area of Support
Endowment funds are comprised of board-designated and donor restricted endowments to be held in perpetuity for the benefit of the Institution. This chart represents the allocation of the total net asset balances of 775 active endowment funds as of December 31, 2020, by area of support.

- General Support: 29%
- Performing and Visual Arts: 20%
- Education & Youth: 14%
- Scholarships: 9%
- Religion: 7%
- Flexible Program & Other: 8%
- Physical Maintenance: 13%
Amythyst Kiah performs at the Amphitheater August 2, 2021. Photo: Dave Munch
**Investment Summary**

Hirtle, Callaghan & Co. LLC serves as the Foundation’s Outsourced Chief Investment Officer and actively manages the majority of the endowment portfolio and the other restricted funds. The remaining portion of the main endowment is invested in a fund of hedge funds, managed by Pointer Management, LLC.

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. During the year, the committee worked closely with Hirtle, Callaghan & Co. LLC to review the expected return of the endowment portfolio and adjusted the long-term target for the asset allocation.

The committee’s oversight responsibilities cover $116.9 million in invested assets. Each portfolio is managed according to its specific objectives, and has a unique asset allocation appropriate to those objectives. Investment performance is measured on a net basis, defined as total time weighted return after all investment management fees.

**Endowment Asset Allocation**

Total endowment portfolio market value was $112.5 million as of December 31, 2020, allocated as shown in the accompanying table.

1) **Endowment** ($112.5 million)
   Individual endowment funds are pooled for investment purposes and tracked with unit accounting. This pooled approach enables endowment funds to collectively benefit from the diversification and efficiencies that are available to larger investors. Each endowment fund receives its proportionate share of return based on the market value of the endowment as a percentage of the total market value of the investment portfolio.

2) **Temporarily restricted** ($1.3 million)
   Other restricted funds are held and managed separately from the main endowment in one of two portfolios, employing conservative investment strategies. One portfolio is primarily held in cash and the other portfolio is invested in bonds as well as cash.

3) **Pooled life income fund** ($3.1 million)
   The pooled life income fund (PLIF) is managed by Key Private Bank. The management and investment strategy of the PLIF is reviewed annually. As of December 31, 2020, 40% of the PLIF assets were invested in equities, 60% in fixed income assets.
Annual Fiscal Year Performance

The Investment Committee takes a long-term approach, over full market cycles, to assess the performance of the portfolio. The performance has been restated from prior fiscal years ended March 31 to calendar years. The benchmark the committee uses to assess performance is net of fees and is diversified based on the strategic allocation of the Russell 3000, MSCI EAFE, HFR Strategic and BarCap Aggregate Bond indices. The benchmark is currently weighted 30% Russell 3000, 30% MSCI EAFE, 20% HFR Strategic and 20% BarCap Aggregate Bond.

Endowment Investment Portfolio

This chart represents the endowment investment portfolio, which has grown by $69.8 million, from $42.7 million as of March 31, 2005, to $112.5 million as of December 31, 2020.
The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of December 31, 2020 and 2019, and the related statements of activities and cash flows for the year ended December 31, 2020 and the nine month period April 1, 2019 through December 31, 2019, 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 December 31, 2020 and 2019 and the results of its operations, changes in net assets and cash flows for the year ended December 31, 2020 and the nine month period April 1, 2019 through December 31, 2019, in accordance with accounting principles generally accepted in the United States of America.

May 14, 2021

Lumsden & McCormick, LLP

The Audit Committee reviewed and discussed the audited financial statements for the year ended December 31, 2020, 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.
## STATEMENTS OF FINANCIAL POSITION

### Assets:

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$1,199,430</td>
<td>$1,240,824</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>2,270,341</td>
<td>2,820,471</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>113,463,972</td>
<td>101,252,805</td>
</tr>
<tr>
<td>Split-interest agreements</td>
<td>4,143,328</td>
<td>4,194,626</td>
</tr>
<tr>
<td>Other assets</td>
<td>578,800</td>
<td>395,000</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$121,655,871</strong></td>
<td><strong>$109,903,726</strong></td>
</tr>
</tbody>
</table>

### Liabilities and Net Assets:

### Liabilities:

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable to the Institution (Note 4)</td>
<td>$1,201,912</td>
<td>$2,020,247</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>50,216</td>
<td>245,968</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>1,252,128</strong></td>
<td><strong>2,266,215</strong></td>
</tr>
</tbody>
</table>

### Net Assets (Note 5):

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without donor restrictions</td>
<td>5,979,246</td>
<td>4,703,274</td>
</tr>
<tr>
<td>With donor restrictions</td>
<td>114,424,497</td>
<td>102,934,237</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>120,403,743</strong></td>
<td><strong>107,637,511</strong></td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$121,655,871</strong></td>
<td><strong>$109,903,726</strong></td>
</tr>
</tbody>
</table>

See accompanying notes.
### Year Ended December 31, 2020

#### Revenues:

<table>
<thead>
<tr>
<th>Contributions:</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chautauqua Fund</td>
<td>$</td>
<td>-</td>
<td>$</td>
</tr>
<tr>
<td>Endowment</td>
<td>855,236</td>
<td>3,197,276</td>
<td>4,052,512</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>85,462</td>
<td>85,462</td>
</tr>
<tr>
<td>Change in value of</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>split interest agreements</td>
<td>-</td>
<td>(51,298)</td>
<td>(51,298)</td>
</tr>
<tr>
<td>Investment income</td>
<td>616,953</td>
<td>13,223,846</td>
<td>13,840,799</td>
</tr>
<tr>
<td>Total revenues</td>
<td>1,472,189</td>
<td>16,455,286</td>
<td>17,927,475</td>
</tr>
</tbody>
</table>

#### Expenses:

<table>
<thead>
<tr>
<th>Direct support:</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chautauqua Fund</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>4,450,000</td>
<td>-</td>
<td>4,450,000</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>97,429</td>
<td>-</td>
<td>97,429</td>
</tr>
<tr>
<td>Indirect support</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>General and administrative</td>
<td>613,814</td>
<td>-</td>
<td>613,814</td>
</tr>
<tr>
<td>Total expenses</td>
<td>5,161,243</td>
<td>-</td>
<td>5,161,243</td>
</tr>
</tbody>
</table>

#### Net assets released from restrictions

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>4,965,026</td>
<td>(4,965,026)</td>
<td>-</td>
</tr>
</tbody>
</table>

#### Change in net assets

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,275,972</td>
<td>11,490,260</td>
<td>12,766,232</td>
</tr>
</tbody>
</table>

#### Net assets - beginning

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>4,703,274</td>
<td>102,934,237</td>
<td>107,637,511</td>
</tr>
</tbody>
</table>

#### Net assets - ending

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 5,979,246</td>
<td>$ 114,424,497</td>
<td>$ 120,403,743</td>
</tr>
</tbody>
</table>

See accompanying notes.
## Nine Months Ended December 31, 2019

### Revenues:

#### Contributions:
- **Chautauqua Fund**: $4,291,683
- **Endowment**: 49,936
- **Other**: -

#### Change in value of split interest agreements:
- **Without Donor Restrictions**: -
- **With Donor Restrictions**: 167,007

#### Investment income:
- **Without Donor Restrictions**: 349,314
- **With Donor Restrictions**: 7,810,413

#### Total revenues:
- **Without Donor Restrictions**: 399,250
- **With Donor Restrictions**: 13,468,103

### Expenses:

#### Direct support:
- **Chautauqua Fund**: 4,291,683
- **Endowment direct support**: -
- **Support from other funds**: 22,199

#### Indirect support:
- **Without Donor Restrictions**: 1,680,492
- **With Donor Restrictions**: -

#### General and administrative:
- **Without Donor Restrictions**: 321,424
- **With Donor Restrictions**: -

#### Total expenses:
- **Without Donor Restrictions**: 6,315,798
- **With Donor Restrictions**: -

### Net assets released from restrictions
- **Without Donor Restrictions**: 6,228,559
- **With Donor Restrictions**: (6,228,559)

### Change in net assets:
- **Without Donor Restrictions**: 312,011
- **With Donor Restrictions**: 7,239,544

### Net assets - beginning
- **Without Donor Restrictions**: 4,391,263
- **With Donor Restrictions**: 95,694,693

### Net assets - ending
- **Without Donor Restrictions**: 4,703,274
- **With Donor Restrictions**: 102,934,237

### Net assets - total
- **Without Donor Restrictions**: $4,703,274
- **With Donor Restrictions**: $107,637,511

---

See accompanying notes.
### Operating activities:

<table>
<thead>
<tr>
<th>Description</th>
<th>Year Ended December 31, 2020</th>
<th>Nine Months Ended December 31, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$ 12,766,232</td>
<td>$ 7,551,555</td>
</tr>
<tr>
<td>Adjustments to reconcile change in net assets to net cash flows from operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>(13,164,830)</td>
<td>(6,736,377)</td>
</tr>
<tr>
<td>Changes in other operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>550,130</td>
<td>792,332</td>
</tr>
<tr>
<td>Receivable from split-interest agreements</td>
<td>51,298</td>
<td>(167,007)</td>
</tr>
<tr>
<td>Other assets</td>
<td>(183,800)</td>
<td>331,662</td>
</tr>
<tr>
<td>Payable to the Institution</td>
<td>(818,335)</td>
<td>(2,191,257)</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>(195,752)</td>
<td>30,716</td>
</tr>
<tr>
<td>Net operating activities</td>
<td>(995,057)</td>
<td>(388,376)</td>
</tr>
</tbody>
</table>

### Investing activities:

<table>
<thead>
<tr>
<th>Description</th>
<th>Year Ended December 31, 2020</th>
<th>Nine Months Ended December 31, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchases of investments</td>
<td>(12,021,310)</td>
<td>(7,410,566)</td>
</tr>
<tr>
<td>Proceeds from sales of investments</td>
<td>12,974,973</td>
<td>7,061,301</td>
</tr>
<tr>
<td>Net investing activities</td>
<td>953,663</td>
<td>(349,265)</td>
</tr>
<tr>
<td>Net change in cash</td>
<td>(41,394)</td>
<td>(737,641)</td>
</tr>
<tr>
<td>Cash - beginning</td>
<td>1,240,824</td>
<td>1,978,465</td>
</tr>
<tr>
<td>Cash - ending</td>
<td>$ 1,199,430</td>
<td>$ 1,240,824</td>
</tr>
</tbody>
</table>

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

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

Effective December 31, 2019, the fiscal year-end of the Foundation was changed from March 31 to December 31. Accordingly, the accompanying financial statements include comparative activity for the year ended December 31, 2020 and the nine months ended December 31, 2019.

Subsequent Events:
The Foundation has evaluated events and transactions for potential recognition or disclosure through May 14, 2021, the date the financial statements were available to be issued.

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

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

Investments:
Investments are stated at estimated fair value. The fair value of marketable securities is determined by quoted prices in active markets. The Foundation uses net asset value (NAV) per share (or its equivalent) as a practical expedient to determine the fair value of investments that (i) do not have a readily determinable fair value predicated upon quoted prices in active markets, and (ii) have the attributes of an investment company or prepare their financial statements consistent with the measurement principles of an investment company (Note 8).

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

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

Conditional promises to give to the Foundation are not recorded as revenue until such time as the conditions are substantially met, and totaled $41,155,000 and $41,963,000 at December 31, 2020 and 2019.

Split-Interest Agreements:
The Foundation receives contributions in the form of split-interest agreements which consist primarily of charitable remainder trusts and pooled life income funds. The estimated receivable under these agreements are recorded at the net present value of the estimate future benefits to be received based upon the life expectancy of the income beneficiaries using an appropriate discount rate. Subsequent changes in value are recorded as change in value of split-interest agreements in the statements of activities. The value of underlying assets of the split interest agreements were approximately $11,221,000 and $10,814,000 at December 31, 2020 and 2019.

Support to the Institution:
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. Prior to 2020, Chautauqua Fund contributions (as defined by the Institution) were received directly by the Foundation and distributed to the Institution in the same year received by the Foundation. Effective January 1, 2020, Chautauqua Fund contributions are no longer received by the Foundation.

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

2. Contributions Receivable:

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross unconditional promises to give</td>
<td>$2,345,235</td>
<td>$3,029,507</td>
</tr>
<tr>
<td>Less unamortized discount</td>
<td>74,894</td>
<td>209,036</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,270,341</strong></td>
<td><strong>$2,820,471</strong></td>
</tr>
</tbody>
</table>

Contributions receivable at December 31, 2020 are expected to be received over the periods shown below:

<table>
<thead>
<tr>
<th>Period</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>$1,277,170</td>
</tr>
<tr>
<td>One to five years</td>
<td>1,068,065</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,345,235</strong></td>
</tr>
</tbody>
</table>
3. Investments:

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$8,601,749</td>
<td>$1,440,549</td>
</tr>
<tr>
<td>Equities</td>
<td>43,812,761</td>
<td>45,155,065</td>
</tr>
<tr>
<td>Fixed income</td>
<td>19,374,000</td>
<td>18,395,627</td>
</tr>
<tr>
<td>Hedge fund</td>
<td>19,602,858</td>
<td>21,664,595</td>
</tr>
<tr>
<td>Private equity/credit</td>
<td>13,265,707</td>
<td>10,596,969</td>
</tr>
<tr>
<td>Select equity</td>
<td>8,806,897</td>
<td>4,000,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$113,463,972</td>
<td>$101,252,805</td>
</tr>
</tbody>
</table>

Investment activity reported in the Statements of Activities is as follows:

<table>
<thead>
<tr>
<th>Year Ended 12/31/20</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dividends and interest, net</td>
<td>$45,371</td>
<td>$630,598</td>
<td>$675,969</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>571,582</td>
<td>12,593,248</td>
<td>13,164,830</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$616,953</td>
<td>$13,223,846</td>
<td>$13,840,799</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nine Months Ended 12/31/19</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dividends and interest, net</td>
<td>$72,056</td>
<td>$1,351,294</td>
<td>$1,423,350</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>277,258</td>
<td>6,459,119</td>
<td>6,736,377</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$349,314</td>
<td>$7,810,413</td>
<td>$8,159,727</td>
</tr>
</tbody>
</table>

As of December 31, 2020, the Foundation has committed capital of approximately $21,750,000 to private equity investments and the remaining obligation under these commitments totaled approximately $7,665,000. These investments generally cannot be redeemed. Distributions from these investments are received as underlying investments and liquidated. At December 31, 2020, it is estimated the underlying assets will be liquidated over a period of approximately 5 to 15 years.

Liquidity of the Foundation's investments is as follows as of December 31:

<table>
<thead>
<tr>
<th>Redemption frequency</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>$71,788,510</td>
<td>$64,991,241</td>
</tr>
<tr>
<td>Quarterly</td>
<td>4,806,897</td>
<td>-</td>
</tr>
<tr>
<td>Semi-annually</td>
<td>19,602,858</td>
<td>12,215,787</td>
</tr>
<tr>
<td>Quarterly after initial lock-up period</td>
<td>4,000,000</td>
<td>4,000,000</td>
</tr>
<tr>
<td>Semi-annually after initial lock-up period</td>
<td>-</td>
<td>9,448,808</td>
</tr>
<tr>
<td>Nonredeemable</td>
<td>13,265,707</td>
<td>10,596,969</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$113,463,972</td>
<td>$101,252,805</td>
</tr>
</tbody>
</table>

4. Transactions with the Institution:

Distributions to the Institution primarily consists of appropriations from donor restricted endowment funds where the underlying restriction has been met and for purposes approved by the Foundation’s Board. Other transactions include reimbursements to the Institution for various personnel and administrative expenses and from time to time amounts due to and due from each entity based upon donor intent.

Total amounts payable to the Institution is as follows at December 31:

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Endowment direct support</td>
<td>$1,147,519</td>
<td>$661,911</td>
</tr>
<tr>
<td>Board-designated appropriations</td>
<td>-</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Other</td>
<td>54,393</td>
<td>358,336</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$1,201,912</td>
<td>$2,020,247</td>
</tr>
</tbody>
</table>

Effective January 1, 2020, the Office of Advancement was moved from the Foundation to the Institution. Prior to 2020, the Foundation’s expenses related to the Office of Advancement were reported as indirect support in the accompanying financial statements as this activity was on behalf of the Institution. With the move of the Office of Advancement to the Institution, there are no expenses reported as indirect support for the year ended December 31, 2020.

For the year ended December 31, 2020, the Foundation agreed to reimburse the Institution in the amount of $250,000 for certain administrative costs incurred on behalf of the Foundation. There was no such agreement for the nine months ended December 31, 2019.

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

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.

5. Net Assets:
The Foundation’s financial position and activities are reported according to two classes of net assets: net assets without donor restrictions and net assets with donor restrictions. Net assets with donor restrictions are those whose use has been limited by donors for a specified time period, purpose or to be maintained by the Foundation in perpetuity.

The composition of net assets without donor restrictions is as follows at December 31:

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board-designated endowments</td>
<td>$4,935,482</td>
<td>$3,706,438</td>
</tr>
<tr>
<td>Unrestricted gifts</td>
<td>1,043,764</td>
<td>996,836</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$5,979,246</strong></td>
<td><strong>$4,703,274</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$19,989,741</td>
<td>$13,206,045</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>5,829,304</td>
<td>3,849,586</td>
</tr>
<tr>
<td>Other restricted gifts</td>
<td>310,025</td>
<td>320,713</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$26,129,070</strong></td>
<td><strong>$17,376,344</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$65,150,562</td>
<td>$62,701,741</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>23,144,865</td>
<td>22,856,152</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$88,295,427</strong></td>
<td><strong>$85,557,893</strong></td>
</tr>
</tbody>
</table>

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level the donor requires the Foundation to retain as a fund of perpetual duration. The Foundation permits spending from underwater endowment funds unless otherwise precluded by donor intent or relevant laws. Deficiencies of this nature exist in three donor restricted endowment funds, which together have an original gift value of $50,335 and a deficiency of $6,817 as of December 31, 2020.

6. 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 approximately $15,000 for the year ended December 31, 2020 and $68,000 for the nine months ended December 31, 2019.

7. Financial Assets Available for Operating Purposes:
The Foundation obtains financial assets primarily through contributions and investment income. The financial assets are acquired throughout the year to help meet the Foundation’s cash needs to provide support to the Institution and for general expenditures in accordance with the Foundation’s spending policy.

8. Fair Value Measurements:
As described in Note 1, the Foundation’s investments are stated at estimated fair value. The fair values of these assets are determined as follows at December 31:

<table>
<thead>
<tr>
<th></th>
<th>Quoted Prices in Active Markets</th>
<th>Net Asset Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2020</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$8,601,749</td>
<td>$-</td>
</tr>
<tr>
<td>Equities</td>
<td>43,812,761</td>
<td>-</td>
</tr>
<tr>
<td>Fixed income</td>
<td>19,374,000</td>
<td>-</td>
</tr>
<tr>
<td>Hedge fund</td>
<td>-</td>
<td>19,602,858</td>
</tr>
<tr>
<td>Private equity/credit</td>
<td>-</td>
<td>13,265,707</td>
</tr>
<tr>
<td>Select equity</td>
<td>-</td>
<td>8,806,897</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$71,788,510</strong></td>
<td><strong>$41,675,462</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Quoted Prices in Active Markets</th>
<th>Net Asset Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2019</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$1,440,549</td>
<td>$-</td>
</tr>
<tr>
<td>Equities</td>
<td>45,155,065</td>
<td>-</td>
</tr>
<tr>
<td>Fixed income</td>
<td>18,395,627</td>
<td>-</td>
</tr>
<tr>
<td>Hedge fund</td>
<td>-</td>
<td>21,664,595</td>
</tr>
<tr>
<td>Private equity</td>
<td>-</td>
<td>10,596,969</td>
</tr>
<tr>
<td>Select equity</td>
<td>-</td>
<td>4,000,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$64,991,241</strong></td>
<td><strong>$36,261,564</strong></td>
</tr>
</tbody>
</table>
9. Endowment Assets:
The Foundation's endowment assets are comprised of board-designated 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 support to the Institution, as well as general and administrative expenses, total spending should range from 3% to 6.5% of the beginning of year market value of the Foundation’s endowment investment 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 Prudent Management of Institutional Funds Act (NYPMIFA) as requiring the preservation of the fair value of the original gift as of the gift date of donor endowment funds, absent explicit donor stipulations to the contrary. As a result of this interpretation, the Foundation classifies as net assets with donor restrictions (a) the original value of gifts donated to be maintained in perpetuity, (b) the original value of subsequent gifts to the endowment fund, and (c) accumulations to the endowment fund made in accordance with the direction of a donor gift instrument at the time the accumulation is added to the fund. In accordance with NYPMIFA, the Foundation considers the following factors to appropriate or accumulate donor restricted endowment funds:

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

Investment activity is allocated among the endowment assets based upon their proportionate share of the investment portfolio. Investment activity related to the board-designated endowment is shown as an increase (decrease) in net assets without donor restrictions. Investment income related to the donor-restricted endowments is reported as an increase (decrease) to net assets with donor restrictions until appropriated in accordance with the Foundation’s spending policy.

The Foundation’s endowment investment assets activity for the year ended December 31, 2020 and the nine months ended December 31, 2019 is as follows:

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Board-Designated</td>
</tr>
<tr>
<td>Year Ended December 31, 2020</td>
<td>$3,706,438</td>
</tr>
<tr>
<td>Investment assets – Beginning of year</td>
<td>$3,706,438</td>
</tr>
<tr>
<td>Investment income</td>
<td>563,884</td>
</tr>
<tr>
<td>Contributions</td>
<td>855,236</td>
</tr>
<tr>
<td>Other adjustments</td>
<td>-</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(190,076)</td>
</tr>
<tr>
<td>Endowment assets – end of year</td>
<td>$4,935,482</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nine Months Ended December 31, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without Donor Restrictions</td>
</tr>
<tr>
<td>-----------------------------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Endowment assets – Beginning of period</td>
</tr>
<tr>
<td>Investment income</td>
</tr>
<tr>
<td>Contributions</td>
</tr>
<tr>
<td>Other adjustments</td>
</tr>
<tr>
<td>Appropriated</td>
</tr>
<tr>
<td>Endowment assets – end of period</td>
</tr>
</tbody>
</table>
### 10. Expenses by Nature and Function:

<table>
<thead>
<tr>
<th>Year Ended December 31, 2020</th>
<th>Direct Support</th>
<th>Indirect Support</th>
<th>General and Administrative</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund appropriations</td>
<td>$ 4,547,429</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 4,547,429</td>
</tr>
<tr>
<td>Personnel costs</td>
<td>-</td>
<td>-</td>
<td>273,051</td>
<td>273,051</td>
</tr>
<tr>
<td>Institution supporting services</td>
<td>-</td>
<td>-</td>
<td>250,000</td>
<td>250,000</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>-</td>
<td>-</td>
<td>2,245</td>
<td>2,245</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>-</td>
<td>-</td>
<td>63,551</td>
<td>63,551</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>-</td>
<td>24,967</td>
<td>24,967</td>
</tr>
<tr>
<td></td>
<td>$ 4,547,429</td>
<td>$ -</td>
<td>$ 613,814</td>
<td>$ 5,161,243</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nine Months Ended December 31, 2019</th>
<th>Direct Support</th>
<th>Indirect Support</th>
<th>General and Administrative</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund appropriations</td>
<td>$ 4,313,882</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 4,313,882</td>
</tr>
<tr>
<td>Personnel costs</td>
<td>-</td>
<td>1,213,072</td>
<td>234,081</td>
<td>1,447,153</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>-</td>
<td>144,427</td>
<td>21,414</td>
<td>165,841</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>-</td>
<td>134,884</td>
<td>37,862</td>
<td>172,746</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>188,109</td>
<td>28,067</td>
<td>216,176</td>
</tr>
<tr>
<td></td>
<td>$ 4,313,882</td>
<td>$ 1,680,492</td>
<td>$ 321,424</td>
<td>$ 6,315,798</td>
</tr>
</tbody>
</table>

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

### 11. Risks and Uncertainties Related to COVID-19:

On January 31, 2020, the United States Secretary of Health and Human Services (HHS) declared a public health emergency related to the global spread of coronavirus COVID-19, and a pandemic was declared by the World Health Organization in February 2020. Efforts to fight the widespread disease included limiting or closing many businesses and resulted in a severe disruption of operations for organizations. Financial markets also experienced significant fluctuations in value.

The full extent of the impact of COVID-19 on the Foundation’s financial performance will depend on further developments, including the duration and spread of the outbreak, and its impact on the financial markets and the Foundation’s donors and the Institution, none of which can be predicted.
ENDOWMENT FUNDS

UNSPECIFIED FUNDS
$31,591,039 Net Assets
$1,213,455 Support to the Institution

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

- Paul M. Alexander Fund
- Mary Apple Fund
- Katherine G. Bailey Fund
  Arthur S. and Barbara F. Banner Endowment for Chautauqua
  Robert and Je’Anne Bargar Endowment
  Zoe and Ken Balley Endowment
  Beatrice B. Bates Fund
- Nancy and Dick Bechtolt Fund
- Thomas and Jane Becker Endowment
- Josephine A. Bell Endowment for Chautauqua
- Bemus Fund for Chautauqua
- Gordon Benn Fund
- Alan J. and Mary Hough Blair Fund
- The Erika Block Fund for Chautauqua
- Martha Borowsky Endowment Fund
- Bosland Family Fund
- Boyle Family Fund
- Barbara A. and Patrick James Brady III Endowment for Chautauqua
- Sara E. Bradley Endowment for Chautauqua
- Barbara and William Branch Fund
- Daniel and Wanita Bratton Endowment
- Lillian Brink Endowment Fund
- Gary M. and Willow R. Brost Endowment for Chautauqua
- Henrietta T. Campbell Fund
- Maxine M. Carleton Fund
- Katharine J. Carnahan Endowment
- Barbara P. and Howard E. Chadwick Fund
- Genevieve Cheney Fund
- Julia and William Clinger Fund
- Marion and Eugene Cohen Fund
- Ruth K. Collyer Endowment
- Jack and Marcia Connolly Fund for Chautauqua
- The Mildred K. Cooper Fund for Chautauqua
- William F. and Thelma L. Cooper Endowment for Chautauqua
- Helen and George L. Cornell Fund
- Katharine and Robert W. Cornell Fund
- Sarah A. Coms 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
- Joanne Babcock Fuller Endowment
- Gelb Family Endowment for Chautauqua
- William R. and Betsy Callicott Goodell Endowment
- Kathleen M. and Donald C. Greenhouse Endowment for Chautauqua
- Jean Edgcumbe Groff Endowment for Chautauqua
- Groninger Family Fund
- Habenicht Family Fund
- Felicia Grace Hall Fund
- Tirzah H. Hall Fund
- Sarah R. Hankey Fund for Chautauqua
- Diana and Samuel Harbison Endowment
- Walter O. and Joan S. Harf Fund
- W. Murray and Pegi M. Hamner Endowment for Chautauqua
- Heber R. Harper Fund
- Drs. Thomas J. and Patricia H. Hasbach Endowment for Chautauqua
- Eleanor McKnight Haupt Endowment for Chautauqua
- Charles H. Heinz Fund
- Lisa Heinz Endowment for Chautauqua
- Dorothy S. and William F. Hill, II Endowment for Chautauqua
- Holden Family Fund
- The Burritt and Joanne Hubbard Family Fund
- Margaret A. Hukill Endowment for Chautauqua
- Charles R. Hunter, Jr. Fund
- Esther M. Huntoon Fund
- Verna Jackson Memorial Endowment for Chautauqua
- James Family Fund
- Donald D. Jansen Endowment for Chautauqua
- Katherine King Karslake Fund
- Ronald L. and Rosie C. Kilpatrick Endowment
- Georgiana Bole King Endowment
- The Lawrence G. Knecht Fund
- Knox Family Endowment
- Frank and Bitsy Koehler Endowment for Chautauqua
- Konneker Fund
- Mary E. Kuhns Fund
- Robert and Susan Laubach Endowment
- LeClere Family Endowment
- The Lemonade Fund
Elizabeth S. & Reginald A. Lenna Fund
Stella C. Logan Fund
Sara M. and Robert S. Lucas Fund
Stan and Sara Lundine Fund
Lyndall Family Fund
Ann and Charles H. Lytle Endowment
Jeannette B. Mainwood Fund
Gerald and Dorothea Maloney Endowment
Clara Masik Endowment
Lillian W. Masters Endowment for Chautauqua
Candace and Scott Maxwell Fund
Mary E. McCarn Fund
Mary Jane and Donald McClurg Endowment
Margaret C. Mercer Endowment
Richard H. Miller Fund
Dawson E. Charlotte B. Molyneaux Endowment
Jane C. Morgan Fund
Lewis W. & Katherine C. Morgan Fund
James R. Morris III Fund
The George E. and Susan Moran Murphy Family Fund
Orlov Family Fund for Chautauqua
Robert B. and June A. Osburn Fund
Robert Pace Endowment Fund
Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
Mary C. and William H. Park Fund
Mary Lou Cady Parlato Endowment for Chautauqua
Charles E. and Gladys W. Peirce Fund
Donald R. Pembridge and Rosalie H. Pembridge Endowment for Chautauqua
Margaret Penn Fund
Sheila Penrose and Ernest Mahaffey Endowment for Chautauqua
Steven W. and Barbara P. Percy Endowment for Chautauqua
Helen Pickup-Hyman Fund
Mary Ellen Pindyck Fund
Sam and Petey Tinkham Price Family Fund
Evelyn Joyce Ramsdell Fund
Mary Oram Reading Fund
Agnes H. Reigart Fund
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 Walton 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
SPECIFIED FUNDS
$81,220,541 Net Assets
$3,236,545 Support to the Institution

New funds are designated in orange.

PHYSICAL MAINTENANCE FUNDS
$15,398,161 Net Assets
$612,512 Support to the Institution

Buildings and Structures
$13,029,022 Net Assets
$514,344 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 Youth Endowment Fund
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 Bonnefoiux-McBride Hall
Golf Course Maintenance and Growth Fund
The Seth A. and Helen F. Goodwin Fund to Maintain the Pier Building
Kitty and Blieu Greenberg Amphitheater Endowment
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
Anne R. Logan Fund
Jackie Lynch Studio Endowment
The Massey Memorial Organ Fund
The McClure Shuffleboard Fund
McKnight Hall Maintenance Endowment
Miller Edison Cottage Endowment

Specific Gardens and Parks
$1,709,846 Net Assets
$70,905 Support to the Institution

The Reid B. Babcox Memorial Garden Terrace Endowment
The Bell/Ritts Garden Fund
Arlene 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
J. Marcus and Ellen Bernstein Fultz Family Gardens
Peggy Foley Memorial Garden Fund
The Jean Rice Goodell Garden Fund
The Robert Y. Gromet Family Garden Fund
The Mary Kimball Haker Memorial Garden Endowment Fund
The Eleanor McKnight Haupt Fund
The Holden Garden Fund
Patricia K. Ives Memorial Beautification Fund
Melvin Johnson Sculpture Garden Endowment
Henrietta Ord Jones Memorial Fund
The JoAnn Jubell Memorial Fund
The Judson Park Fund
Ryan Kiblin Memorial Stormwater Park Endowment
Janet F. and Arthur C. LeVan, Sr. Garden Fund
Joan Lincoln Garden Fund
The Winifred B. McCune Memorial Garden Fund
Miller Edison Cottage Garden Endowment
Mary Louise Molyneaux Garden Fund
Penneys Garden Endowment
Ride/Savage Memorial Garden Fund
Timothy Ritacco Play Area Endowment
The Michael M. Ross Garden Fund
The Mme. Shao Fang Sheng Garden Fund
Toni Sterman Memorial Garden
The Stephen Toms Garden Fund
Randall E. Widrig Memorial Garden Fund
Nancy Hyde Wilbur Memorial Fund
The Dr. Alan Winkelstein Garden Fund
The Frank Lloyd Wright Garden Fund
The Frank Lloyd Wright School of Architecture and Taliesin Fellowship Garden Fund

General Grounds and Gardens
$659,292 Assets
$27,263 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
Watters Family Fund

EDUCATION & YOUTH FUNDS
$15,650,190 Net Assets
$636,257 Support to the Institution

Lectureships
$11,301,403 Net Assets
$458,348 Support to the Institution
10:45 Lecture Platform Endowment
Malcolm Anderson Lecture Fund

The Sondra R. and R. Quintus Anderson Lectureship
Helen S. and Merrill L. Bank Lectureship
David and Wendy Barenfeld Lectureship Fund
The Crawford N. and May Sellstrom Bargar Lectureship in Business and Economics
Robert S. Bargar Memorial Lectureship
The Arnold and Jill Bellowe Lectureship
Berglund-Weiss Lectureship Fund
June and Albert Bonyor Lectureship Fund
Dr. Edwin Prince Booth Memorial Lectureship Fund
The Boyle Family Lectureship Fund
Selina and Walter Braham Lectureship
The Richard Newman Campen “Chautauqua Impressions” Fund
Carnahan-Jackson Lectureship
Chautauqua Fellows Fund
William and Julia Clinger Lectureship
Beverly and Bruce Conner Endowment for Education
The Joseph H. DeFrees Memorial Lecture
The Edith B. and Arthur E. Earley Lectureship
The Eleanor Fund Lectureship Endowment
The Foglesong Family Lectureship Fund
The Charles and Gail Gamble Lecture Endowment
Barbara A. Georgescu Lectureship Endowment
The Charles Ellsworth Goodell Lectureship in Government and Public Affairs
The Susan Hirt Hagen Lectureship
The Thomas L. Hagner and Linda Ulrich-Hagner Lectureship Fund
Travis E. and Betty J. Halford Lectureship Endowment
G. Thomas and Kathleen Harrick Lectureship Endowment
The Dr. Robert R. Hesse Lectureship
The Higie Family Lectureship
Sue Hammond Innes Lectureship in Science
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  
Kathryn Sisson Phillips Memorial Lectureship Fund  
The Richard and Emily Smucker Endowment Fund  
Marjorie and Frank Sterritte Lectureship  
The Ethel Paris and Theodore Albert Viehe Lectureship  
John M. Wadsworth Lectureship on Free Market and Libertarian Principles  
The Dorothy M. Wissel Lectureship  

Literary Arts  
$1,402,812 Net Assets  
$57,858 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  
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  
$730,430 Net Assets  
$29,841 Support to the Institution  
Ward T. Bower Youth Activities Memorial  
Elizabeth Elser Doolittle Endowment 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  
$2,215,545 Net Assets  
$90,210 Support to the Institution  
Lillian Brink Education Fund  
Barbara R. Foorman Science Literacy Endowment  
McCredie Family Director of Boys’ and Girls’ Club  
Emily and Richard Smucker Directorship for Education  

FINE & PERFORMING ARTS FUNDS  
$22,359,353 Net Assets  
$914,494 Support to the Institution  

General  
$4,765,208 Net Assets  
$193,073 Support to the Institution  
The John T. and Katherine G. Bailey Family Fund  
Evie and Stacey Berger Endowment for Emerging Artists  
The Boyle Family Fund for the Performing Arts  
Emily McKnight Corry Endowment  
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  
$4,941,574 Net Assets  
$205,716 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  
The Chautauqua Opera Guild Endowment  
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 Steve Z. and Mary G. Mitchell Family Fund
The Reverend Lloyd V. Moffett Opera Endowment Fund
The Robert G. and Lillian Vitanza Ney Family Opera Fund
The Joseph A. and Anne T. Prezio Opera Endowment Fund
The Richards Family Opera Fund
The Molly Rinehart Fund for Opera
The 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

Symphony
$5,689,748 Net Assets
$234,255 Support to the Institution
Clement and Karen Arrison Endowment for Classical Violin
Maggie Bella Symphony Orchestra Endowment Fund
The Boyle Family Fund for the Chautauqua Symphony Orchestra
The Mary Peterson Chalfant Fund for the Chautauqua Symphony Orchestra
Chautauqua Symphony Orchestra Endowment Fund
The Carl and Lee Chaverin Fund
Shirley A. and Arthur R. Duffy Endowment for Classical Guitar
Heitzenrater Family Chautauqua Symphony Orchestra Fund
The William M. Kinley Fund for the Chautauqua Symphony Orchestra
William D. Kuhns Fund for General Music Purposes of Chautauqua Institution
The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra
Helen T. Logan Fund for the Chautauqua Symphony Orchestra
Mr. & Mrs. Sam A. Miller and Mr. & Mrs. Edward S. Babcox Memorial Fund
The Mischakoff/Taylor Concertmaster Chair Fund
Music School Festival Orchestra Fund
Frances and George Newman Endowment for the Chautauqua Symphony Orchestra
Margaret Miller Newman Fund for the Chautauqua Symphony Orchestra
The David B. and Barbara Barrett Orr Music Fund
Av and Janet Posner Fund for the Chautauqua Symphony Orchestra
The Reinberger Fund for the Performing Arts
The Gertrude Aldredge Shelburne Fund
Dan and Linda Silverberg Chautauqua Symphony Orchestra Endowment
The Dr. James and Mary Anne Evans Singleton Fund for the Chautauqua Symphony Orchestra
Symphony Patron Endowment Fund for the Chautauqua Symphony Orchestra
The Trustees' Fund for the Chautauqua Symphony Orchestra
Rita and Dunbar VanDerveer Symphony Principal Chair for Flute
Mary E. Whitaker Symphony Endowment Fund
The Wilder Family Fund for the Chautauqua Symphony Orchestra
Nora J. Williams Symphony Fund
Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra

Theater
$1,729,020 Net Assets
$71,745 Support to the Institution
The Arnold and Jill Bellowe Fund for Theater
The Nancy E. Brewer Fund for Theater
Chautauqua Theater Fund
Court Family Endowment
The Crockett Family Fund for Theater
The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming
Terrie Vaile Hauck Theater Endowment
The Joel and Barbara Jacob and M. Jacob and Sons Fund for Theater
Helen Moe Fund for Theater
The Florence and Cynthia Norton Fund for Theater
The Phoebe Wagner Ott Theater Fund

Dance
$1,395,595 Net Assets
$58,068 Support to the Institution
The Paul and Toni Branch Fund for Dance
Carnahan-Jackson Dance Chair Endowment
The Carnahan-Jackson Dance Endowment
Chautauqua Dance Endowment
Dakin Family Fund for Dance
Terrie Vaile Hauck Dance Endowment
Moore Fund for Dance

Visual Arts
$2,684,887 Net Assets
$103,593 Support to the Institution
JJe’Anne Griffin Barg 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
Leon and Gloria Plevin Family Museum Director Lecture Fund
Sydelle Sonkin and Herb Siegal Artistic Director of the Visual Arts Endowment
Susan and John Turben Director of the VACI Galleries Endowment

OTHER
$1,153,321 Net Assets
$48,044 Support to the Institution
Heintzelman Family Piano Fund
Anne Capper McIntosh and Walter Stevenson McIntosh Endowment for Voice

RELIGION FUNDS
$7,972,992 Net Assets
$308,435 Support to the Institution

General
$1,920,289 Net Assets
$77,217 Support to the Institution
Campbell Department of Religion Fund
The Richard W. and Dorothy B. Comfort Religious Initiatives
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
John F. and Mary Giegengack Jureller Fund for Religion
Nilsen Family Fund for Religious Programming
Lois Raynow Department of Religion Fund
The Waasdorp Fund for Religious Initiatives

Chaplaincies
$1,262,029 Net Assets
$52,572 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**

$1,900,168 Net Assets

$76,836 Support to the Institution

Glenn R. Bucher Memorial Lectureship

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

Deloras K. and L. Beaty Pemberton Lectureship

The Presbyterian Association of Chautauqua Religious Lectureship Fund

Arthur and Helen Reycroft Memorial Religious Lectureship Fund

The H. Parker and Emma O. Sharp Lectureship Fund

Rabbi Samuel and Lynn Stahl Lectureship for the Understanding of Judaism

**Other**

$2,890,507 Net Assets

$101,810 Support to the Institution

Alice A. Allen Fund

John E. Anderson Religion Endowment

The Reverend Noel A. Calhoun, Jr., D.D. Fund

Campbell Department of Religion Audio-Visual Fund

Joan Brown Campbell Department of Religion Endowment

The Chautauqua Fund for Sacred Music and Spiritual Practices

The Jack and Gretchen Grigsby Fund for Choral Enrichment

The Holden-Daney Fellowship Fund

Dr. William N. Jackson Religious Initiative Fund

Jared Jacobsen Endowed Chair for the Organist at Chautauqua Institution

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**

$9,797,096 Net Assets

$352,152 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

Bonnefous/McBride Dance Scholarship

June and Albert Bonyor Scholarship Fund for Ballet

Alexander W. Bouchal Memorial Scholarship

Ward T. Bower Memorial Scholarship

Frederick Percival Boynton Scholarship

JoAnn and Gene Buffo Voice Scholarship

Lowell and Frances Hyam Brentano Fund

The Anne C. Britton Memorial Scholarship

The Charles and Ethel Brody Theater Scholarship

The Gladys Brooks Scholarship Endowment Fund

The Indiana-Peggy Hoover Bryan Voice Scholarship

Shirley Budke Memorial Fund for Blind Students

The Edwin L. Bullock Scholarship

The Lillian B. Bullock Scholarship

Anne S. Burden Music Scholarship

Joseph Clarke Scholarship Fund

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 Gellman 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
Konnerer Scholarship
The John and Mary Lou Kookogey Scholarship
The Kullberg Scholarship
Felicia and Andy Landis Memorial Fund
The LaPenna-Koch Scholarship
The Marilyn G. Levinson and Nathan Gottschalk First Chair Award for MSFO Endowment
Craig J. Luchsinger Memorial Scholarship for Violin
The Anna Mary and Richard M. Maddy Music Scholarship Fund
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Joan Mistrough and her husband James Peck recently made a planned gift to Chautauqua, choosing to allocate a significant sum in their wills to the Foundation’s Unspecified Endowment Fund. The gift is one of several unspecified gifts received last year which boost Chautauqua’s resilience in times of special need and provide essential resources toward new initiatives, creative collaborations, and ongoing operational expenses in future years.

Mistrough and Peck, who live in Metuchen, New Jersey, characterize themselves as “kind of nerdy.” Seventeen years ago they began looking for a different sort of vacation that would exercise their minds while also providing rest and recreation. In his research, James discovered Chautauqua.

“We came for a week that first year, then two weeks the next year,” Joan explained. “And then we started bringing friends to Chautauqua with us. We got a bigger apartment.”

These days, Joan and James spend a lot of time outside on their porch reading and enjoying their view of the lake. James does the cooking. Both work out every day they are on the grounds. James and a buddy take long bike rides in the Chautauqua County countryside. Joan has cultivated an appreciation for chamber music, thanks to Chautauqua’s special performances by visiting musicians. They take in the morning lectures and evening symphony concerts with their visiting friends. They also make a practice of sponsoring students from the School of Music and continue to follow the blossoming careers of the young talents they have befriended. “We got invited to the wedding of one of our students recently,” Joan said with pleasure.

While James and Joan are both retired, they keep a hand in activities that satisfy their desire to give back to the community where they live. James is the former vice president of client services for Wellsoft Corporation. Joan continues to provide financial coaching to individuals on a limited basis. Both are passionate about the YMCA in their region. She served on the board, and James now helps with maintenance at their local facility.

“We get a lot of satisfaction out of making a difference for people,” Joan said. “We love Chautauqua and we’re excited about the changes that are happening here in terms of diversity and inclusion of people of color and the incredible range of ages represented here. We feel the Institution has a great future ahead.”

“Giving to infrastructure as we’ve done is not sexy,” Joan added, “but it is integral to making Chautauqua work well. That’s not to disparage restricted gifts. We trust the staff and volunteer leadership on the board to make decisions about how best to apply our gift. We are not wealthy people, but we know that whatever you give here makes a difference. We get so much from Chautauqua. Giving back means a lot to us.”
The following donors have contributed $10,000 or more to the endowment of the Chautauqua Foundation. We thank them for perpetuating the idea and place of Chautauqua. These totals include gifts received, pledged, transferred to the pooled life income fund and certain planned gift commitments made since May 1937.

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Mrs. Walter L. Miller
Dr. Steve and Mary Gibbs
Mitchell
Helen Vailance Moe
Mary Anne and John Morefield
Mrs. W.A. Morrison
Cynthia Adamson Murray
Mrs. Kathryn K. Musgrove
Mr. and Mrs. Joseph A. Neubauer
Dr. Robert and Lillian Ney
Mr. and Mrs. Christopher D. Norton
Florence H. Norton
Steve and Anne Odland
Richard J. Osborne
Mr. and Mrs. Robert B. Osburn
Barbara and Robert Pace
Ed Paul
Tim and Pat Peters
Dr. and Mrs. Robert L. Pickens
Dr. and Mrs. Joseph A. Prezio
The Rait Family
Dr. Bert and Mary Rappole
Mary Oram Reading
Mary Lou Reed
The Renjilian Family
Les Reynolds and Diane Payne Reynolds
Mark and Ann Ayers Ritacco
Mrs. Mary D. Ritts
Alice and Michael Rudell
Doris H. Ruslink
Jone and Bill Schlackman
Newton B. Schott, Jr. and Toni LeQuire-Schott
Mrs. Gertrude Elser Schroeder
John and Barbara Schubert
Dr. O. Peter Schumacher
Dr. and Mrs. William Blake Selnick
Karen Shellgren
Mme. Shao Fang Sheng
Dorothy E. Shepherd
Dan and Linda Silverberg
Frank D. Skinner
Dr. and Mrs. William T. Smyth
Donald T. Snow, Jr.
Mr. and Mrs. George T. Snyder
Rabbi Samuel and Lynn Stahl
Linda Steckley and Peter Weitzel
Steel Hector and Davis
Allen and Margaret Steere
Mrs. Marjorie P. Sterritte
Dorothy B. Stevenson
Jay A. Summerville
Linda Tyrrell
Mildred T. Underwood
Mr. and Mrs. E.J. Verlie
Richard and Debra Wade Charitable Fund
Evelyn H. Wargo
Ann W. Webb
Mrs. Nina T. Wensley
Helen M. White
Katherine Karslake White
Dr. Jeanne E. Wiebenga and E. Jane Stirniman
Mr. and Mrs. Roy A. Wissel
Shirley M. Woolaway

$25,000–$49,999
Anonymous (2)
Mr. and Mrs. Zachary Abuza
Allegheny Jazz Society
Mary Apple
Leon W. Archer
Rita Argen Auerbach
Sherra and James Babcock
Miss Julia M. Bates
The Beatrice Bates Trust
Tom and Jane Becker
Gordon B. Benn
Susan and Fran Bonsignore
William Wallace Booth
Edward J. and Martha J. Borowsky
Richard and Susan Bosland
Mrs. Alexander W. Bouchal
Mrs. Ward T. Bower
Mr. and Mrs. John L. Bracken
Mr. and Mrs. Walter Braham, Jr.
Mr. and Mrs. John L. Bracken
Mr. and Mrs. Donald D. Jansen
Miss Julia M. Bates
The Beatrice Bates Trust
Tom and Jane Becker
• George and Constance Howard
  Boynton and Diane Hussey
  Juanita Wallace and John Arter
  Jackson
  Louise Jackson
  John and Mary Giegengack Jureller
  Rev. Dr. Xolani and Tamara Nkologue
  Evelyn Hoffman Kasle
  Mr. and Mrs. Charles E. Kaylor
  Kevea and Joan Keest
  Barbara and Herb Keyser
  Joan G. Kissner
  Ann G. and Hans Nkaa
  Lawrence G. Knecht Trust
  Samuel J. Krese
  Dr. Lewis and Alice Kuller
  Mr. and Mrs. Irving B. Lacy
  Gerald F. and Jane Y. Lahey
  Estate of Velma Jean Laird
  The Rev. and Mrs. Thomas C. LeClere
  Mildred Lesenger
  Levi Strauss Foundation
  Arville G. Light, Jr.
  Eli Lilly and Company Foundation
  Paul P. and Anne M. Luchsinger
  Linda and Saul Ludwig
  James H. Lynch, Jr.
  Macy’s Inc.
  The Manor Family Charitable Fund
  Jesse and Cathy Marion
  Mrs. Marianne Elser Markham
  Chris and Sue Martin
  Lillian W. Mesters
  Candace and Scott Maxwell
  John P. McCune
  Mr. and Mrs. William A. McKnight
  Cynthia B. Miller
  Mr. Earle A. Miller
  Valinda Alva Miller-Valich
  Mr. and Mrs. Dawson E. Molyneaux
  Martiza L. Morgan
  Grace L. Newbury
  Mr. and Mrs. Julius Nicolai
  Peter and Gwen Norton
  Office Depot Foundation, Inc.
  Dr. David B. and Barbara J. Barrett Orr
  Charles E. Peirce
  Rebecca A. Penneys
  Mrs. Helen Pickup-Hyman
  Mr. and Mrs. Bruce E. Pindyck
  Mr. and Mrs. Melvin N. Pomerantz
  Presbyterian Association of Chautauqua
  Joyce Ramsdell
  Dick and Caran Redington
  Mary Lou Reed
  Suzanne and Thurston Reid
  Josette and Ron Rolley
  Sarah and David Rosen
  Mary M. Ross
  Rick and Joyce Ross
  Marcia and Jerry Rothchild
  Galen J. Roush
  Dr. and Mrs. R. Bradley Sack
  Peggy and Pope Shuford
  Suzanne Shull
  Dr. James A. and Mary Anne Singleton
  Dr. Bethanne Snodgrass
  Mrs. Nancy Coburn Snyder
  Mrs. Constance Somers
  Jim and Alison Steadman
  Carole Stevens
  Swanson-Harbage Giving Fund
  Eleanor M. Thomas
  Dessie T. Tichenor
  Time Warner Employee Grant Programs
  Dr. and Mrs. Richard B. Viehe
  Visual Arts at Chautauqua Institution
  Mr. and Mrs. Arthur E. Wade
  Nina and Norman Wain
  Carolyn and Bill Ward
  Suzanne and Jeff Watters
  Ms. Jo-an M. Webb
  Herbert R. and Lorraine H. Weier
  Dr. and Mrs. Fred R. Whaley, Sr.
  Cynthia C. and Terry R. White
  Nora J. Williams
  Dent and Joan Williamson
  Mr. and Mrs. Jack A. Winter
  Mr. Jack R. Winter
  Mr. Michael Winter
  Daniel and Pam Wissel
  Sally L. Wissel
  Mara Levinson Wolf Charitable Fund
  Henry L. Wood Untrust
  Caroline P. Young
  Allen and Deborah Zaretzky
  Zurn Industries, Inc.

$10,000–$24,999
Anonymous (8)
Jeff and Lynda Acker
Rena Aldredge
Eleanor Allisron
Nan and Brett Altman
Edward L. Anderson, Jr.
Foundation, Inc.
Myrtle Ambuster
Nancy Miller Annn
Bennie and Dick Arnold
Mr. and Mrs. Reid B. Babcock
Dr. and Mrs. Frank T. Baker
Nancy Gay Bargar
Robert B. and Mary W. Bargar
Steve and Kate Barge
Suzanne Marten Barnes
Dr. Michael L. Barnett
Robert and Joan Battaglin
Patricia S. Beagle
Alice Ward Benedict
The Glenn P. Benjamin Revocable Trust
Dave and Lauren Benson
Donald H. and Barbara K.
Bernstein Foundation
Jim and Kim Biskup
Barbara A. Black
Frances Black
Mr. and Mrs. Alan J. Blair
David R. and Margaret Blossom
Don and Bea Blumenthal
Loretta E. Bower
Judge W. Walter Braham
The Braitmayer Foundation
Wanita Batton
Frances Hyams Brentano
Sarah S. and Frank K. Brown
Steve and Cyndy Brown
Felix Brueck and Ann Kowal Smith
Peggy A. and Leslie Bryan
Jeff and Mary Jo Buckwalter
Dick and Margie Buxbaum
Rev. Dr. Joan Brown Campbell
The Caplice Family Charitable Fund
Janutta and Bob Carithers
Dennis B. Carmichael
Genevieve Chaney
Dr. James J. and Carol A.
Chimento
Mr. and Mrs. John R. Churchill
Alan and Betsy Clark
John R. Cochran
Larry and Luann Cohen

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CHAUTAUQUA FOUNDATION
Mark Cohen and Miriam Vishny
Mr. and Mrs. Dan W. Cook
Mildred K. Cooper
Virginia H. Cox
Mary Frances Cram
William R. Crawford Trust
Joseph and Nancy Cruickshank
Deborah E. and William A. Currin
Dr. Abdallah S. Daar
Ms. Gertrude Daney
Dr. and Mrs. George J. D'Angelo
Mary and Dave Davenport
Karen and David Davenport
Mr. and Mrs. William D. Dawson
Janet and Michael Day
Jo Ann Deblinger
Harry Deischer
Michael & Susan Dell Foundation
Charles and Rebecca Denton
John P. DeVillars
Mollie Dicker
Daphne Jackson Dickson and Family
Patricia and Robert Dietly
Mrs. Harry E. Dobbins
Willis E. Dobbins
The Donum Fund of The Cleveland Foundation
Mrs. Pearl P. Dopp
Barbara M. Dudley
Helen H. Dyer
Dorothy Eadie
The Eisner Foundation
Orril H. Elder
Albert C. Elser
Enviorgas Inc.
James E. Ericksen
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Renee Evans
Mr. and Mrs. Henry Everett
ExxonMobil Foundation
John D. and Laura M. Faust
Dr. Marvin L. and Beverly Fiegelman
Patricia R. Finson
Gerald Flaster
Suzanne and Richard Follansbee
Ruth Harper Follansbee
Robert F. Forbes
W. Jane Foster and Arthur S. Willson
The Fribourg Family
Edward J. and Gloria Palmer-Fuller
Joanne B. Fuller
The G.A.R Foundation
Mimi and Jim Gallo
Jessie Leslie Gallup
Lorraine and Charles Gandy
Louise N. Farnsley Gardner
Mrs. Fred Gasche
Helene Gayle
General Mills Foundation
Helen W. Giacobine
Nancy Gibbs and Waits May
Mr. and Mrs. Joseph Goldfarb
Syd and Ann Chang Goldsmith
Michael Goodell
Kathy and Al Gordon
Dr. Kenneth and Cheryl Gorelick Fund
Adair B. Gould
Dr. and Mrs. Robert W. Graebner
Graphic Forms and Systems
Alan and Melinda Greenberg Foundation
John and Gretchen Grigsby
Jean E. Groff
Linda J. Hack
Mrs. J. Everett Hall
Dr. Homer J. Hall
Murray and Pegi Hamner
Donna and Mark Hampton
John and Judye Hartman
Edna B. Harvey
The Heister Family Charitable Fund of the Ayco Charitable Foundation
Michael E. Hill and Peter M. Korns
Mr. and Mrs. D. Armour Hillstrom
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Tamara N. Hodsden
Sallie Lou Holder
Anita and Sidney Holec
Mrs. Robert Cleveland Holland
Todd Holland and Scotch Ellis Loring
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Mr. and Mrs. Burritt S. Hubbard, Jr.
Hudson Family Foundation
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Luisa Hunnewell and Larry Newman
Robert and Joy Ingersoll
International Order of the King’s Daughters & Sons
David Ives
Christopher Jackson and Family
The Ruth H. Jackson Charitable Trust
Barbara and Joel Jacob
Stephen Jacobs and Patricia Curley
David and Fern Jaffe
William and Susie Jasperson
Bob Jeffrey
Mary Hillman Jennings Foundation
Johnson & Johnson Family of Companies
Mr. and Mrs. Howard L. Johnson
Jeffrey S. Johnson
Jeremy Johnson
Bob and Selina Johnson
Miss Doris Goodrich Jones
Dyeann and Henry Jordan
Patricia Kaighin
Norman and Nancy Karp
Mr. and Mrs. William G. Karslake
Annie H. Kelsey
Kyle and Elizabeth Keogh
Imam Feisal Abdul Rauf and Daisy Khan

Photo: Dave Munch
Georgiana Bole King Trust
Patricia L. King
The Jennifer and Tim Kingston Family Fund
Bob and Priscilla Kirkpatrick
Arvid J. Kling
Mae S. Kling
Mrs. Mary C. Koehler
John and Alice Langenberg
Judith Alison Lee
Mr. and Mrs. Parker H. Lee, III
Martin and Eileen Leinwand
Jack and Ellie Lesser
Clare and Mace Levin
Anita Lin and Michael Morley
Bonnie M. Lincoln
Edna H. Love
Robert S. Lucas Family Trust
Stan and Sara Lundine
Lillian T. Madway Charitable Unitrust
David Magee and Cheryl Roberto
Mrs. Jeannette B. Mainwood
The Milton and Tamar Maltz Family Foundation
Estate of Sara Carson Marrs
Dianne K. Martin
Clara Masik
Elizabeth R. and William G. Mather Fund
Blossom P. McBrier
Mr. Eugene Ross McCarthy
Robert H. McClure
Mary Jane McClurg
Sharon and Alan McClymonds
Mrs. W.D. McCreery
Griff and Pat McDonald
Deborah McKee Moses
Robert S. McKee
Sharon McKee
Grace and John McKinnon
Mrs. Arnold McKinnon
Lindy McNight and Erin Cunningham
J.J. Medveckis Foundation
Edward and Betsy Merchant
Messinger Family Fund of the Arlington Community Foundation
Elizabeth Miller Trust
Ian and Liz Miller Charitable Fund
The Lewis Miller Trust
Mrs. William E. Miller, Jr. Keekee Minor
M.L.E. Foundation, Inc.
Betty and Mike Monin
Mrs. Virginia Moore
Pamela Shaw Morey
Barbara T. Morrison
Deborah McKee Moses
John and Beth Munro
Louise and Joseph Musser
Fred and Lynn Muto
Charitable Fund
Bill and Ellen Neches
Martha L. Neebes
Alice Shelburne Neild
Mr. and Mrs. Jack M. Nelan
Alan and Linda Nelson
Jerold Newman
The Newman’s Own Fund
Sandie and Kevin Nicholson
John A. and Ann Odell
Nancy Okstein
George and Melissa Orlov
James S. Patton
Joe and Susan Patton
Mike and Judy Patton
Rita E. Paul
Pete and Sarah Pedersen
Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
William J. Peterson
William and Jane Pfefferkorn
Pfizer Foundation Matching Gifts Program
Ellis L. Phillips Foundation
Pittsburgh National Bank
Robert and Anne Plyler
Rev. Larry and Linda Poelma
Jeanette A. Polley
Judith Posner
Christine O. Potts
Presbyterian Foundation
Anne S. Prussing
Rosemary Rappole and Diane Randolph
The Reed Family
Isabelle R. Reed
Mr. and Mrs. Christopher Reid
Hollister Reid and A. Quentin Orza, II
Lois J. Reid
Sherry Reid
Agnes H. Reigart
Pamela Pete Reis
Mr. and Mrs. Jack D. Rice
Jay and Marilyn Richey
Kathleen M. Riley
Philip and Rachel Rogers
William D. Rogers
Stephanie R. Rosenblatt
Daniel Rosenthal and Avery Sheffield
Eithne Ross
James and Maureen Rovegno
Dr. David and Susan Rubin
David Sachs and Linda Shackelford
Ann Salsbury
Ralph and Gretchen Sather
Marilyn Scamman
Amy B. Schiller
Phyllis Schultz and Matt Gromet
Helene J. Schwartz
Elizabth R. Scully
Ms. Mary Seifert
Nikki and Brian Selden
Elaine and Allen Short
Betty and Alan Siegel
Gail and Peter Silberstein
Joanne and Bert Simons
Tom and Penny Small
Dr. Robert G. and Katy T. Smith
Jack and Barbara Sobel
Joreta and Richard L. Speck
Clyde Speer
Evangeline McKnight Speer
Marcia Steel
Lois A. Steere
Diane and Jeff Steinhilber Fund
Joan Stevens
Jana Stone
Dan and Ann Sullivan
Vern Swaback
David and Irene Tabish
Mr. Howard Talks and Ms. Carol Hall
Mr. and Mrs. Frank E. Taplin, Jr.
Sue and Gary Tebor
Martha M. Teich
Caroline Thompson and Steve Allen
Brenda and Larry Thompson
Harold and Jean Thurston
Tiger Management L.L.C.
Beatrice C. Treat
Dorothy Trefts and Daniel J. McEvoy
TRW, Inc.
Dr. Carl A. and Mary L. Viehe
Carol and Stephen Viehe
Larry and Maria Wagner
Kitty Baldridge Warman
Kuniko Washio and William Scollard
Dr. Nicholas A. and Carol N. Weil
Florence Mina Miller Weiler
Drs. Jennifer and Robert Weisenthal
Bill and Betty Whitaker
Elizabeth Ann Wick
John B. Wilbur III and Margaret G. Wilbur
Rachel Wilder and Phil Lerman
Norma K. and Allan P. Wilson
Jean Wilson
Mrs. Lou Wineman
Ann P. Winkelstein
Meryl, Chuck, Andrew and Ian Witmer
Mr. and Mrs. Howard Zemsky
Burt and Sandi Zucker
Philanthropic Fund
The late Harold F. Reed, Jr., who passed away last year, was a true Chautauquan. In a 2012 interview with the Chautauqua Foundation, he recalled the day in 1936 that President Franklin Roosevelt made a visit to the Institution to give a talk. Reed was 9 years old.

“I was standing on the bridge across the ravine behind the Amphitheater that day,” Reed recalled. “As the president’s limousine drove up to the Amp, I was overtop his car! The president gave his ‘I Hate War’ speech and people were so proud.”

Reed was a lifelong Chautauquan who served as a director of the Chautauqua Foundation from 1989 to 2001 and an Institution trustee from 1993 to 2001. As an attorney and thoughtful leader who was passionate about lifelong learning, Reed followed in the footsteps of his father, Harold F. Reed Sr., who chaired the Chautauqua Foundation for a decade, beginning in 1957. Reed Sr. helped Chautauqua build its endowment in the early years of the Foundation, topping $1 million in 1958. He also served as a trustee of the Institution.

Reed Sr.—a native of Beaver, Pennsylvania—bought a cottage at 7 Foster which remained in the family throughout his son’s life. In 2007, Reed, Jr. and his wife of 62 years, Martha, made a planned gift to establish the Reed Family Scholarship for students in the School of Music. Earlier, to honor his parents, Reed had also established the Harold F. Reed, Sr. Chaplaincy, supporting clergy visiting the Institution.

“As a child, my father fell in love with Chautauqua, and it became a passion throughout his whole life,” said Reed’s eldest daughter, Jenifer, the third generation of Reeds on the grounds. Her mother Martha had also been familiar with Chautauqua before she met and married Harold through her sister and brother-in-law, who owned a home on the grounds.

“My mother, a life-long pianist, went to Mount Holyoke and was a singer in the women’s college vocal group, the V-8’s,” Jenifer added. “Her sister Mary was also a vocalist, as was George, my dad’s only brother. Their generation participated in and adored the music programs at Chautauqua. My mother also had a great passion for the Massey Organ. Our parents naturally passed along this love of music to us.”

This year, after their father’s death in May 2020, the Reed siblings made the difficult decision to sell the family home at Chautauqua. “Losing dad just as the pandemic forced the cancellation of the season brought us all back to Chautauqua at different points this past year. I am glad dad did not have to experience that absence of the regular season.”

Harold Reed, Jr. left behind six grandchildren. “We all raised our children in Club, and my brother Pat’s daughter, Carey, followed in her grandfather’s footsteps as a Club counselor for a number of years,” Jenifer explained. “My sister Nancy and I both worked at the Athenaeum as servers when we were teenagers, and our brother Tom was a bellman at the hotel. Today our families are spread across the country, and we made the difficult but unified decision to let the cottage go.”

Jenifer studied in the Chautauqua drama program, worked in professional theater in her younger years, and later was a volunteer drama teacher. She lives in Minnesota. Her brother Pat resides with his family in Connecticut. Sister Nancy, an attorney, has retired to North Carolina, and their younger brother Tom is a business executive in Michigan.

It is a comfort to the Reed siblings to contemplate the legacy their parents created at Chautauqua through the generous Reed Family Scholarship. “It is such a beautiful marriage of their passions for education and music,” Jenifer said.

As Harold Reed, Jr. put it in the 2012 interview, “When I looked at the list of donors to Chautauqua this past year, I was very interested to find two of my children on the list. I don’t ever recall my father asking me to donate, and I didn’t ask my kids. It pleases me that they have the same love in their hearts that I have for Chautauqua. Philanthropy will always be essential to this place.”
### OFFICERS, DIRECTORS AND STAFF

#### Directors Term Expires

<table>
<thead>
<tr>
<th>Name</th>
<th>Term Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td>David W. Anderson of Hingham, Massachusetts</td>
<td>2, 3, 5, 6 2023</td>
</tr>
<tr>
<td>Chair, Nominating &amp; Governance Committee</td>
<td></td>
</tr>
<tr>
<td>Andrew L. Camden of Grosse Pointe, Michigan</td>
<td>3, 5, 6 2021</td>
</tr>
<tr>
<td>Chair, Investment Committee</td>
<td></td>
</tr>
<tr>
<td>Charles S. Gamble of Dunedin, Florida</td>
<td>1, 4, 5 2024</td>
</tr>
<tr>
<td>Karen J. Goodell of New York, New York</td>
<td>2, 3, 6 2021</td>
</tr>
<tr>
<td>John Haughton of Buffalo, New York</td>
<td>2, 4, 6 2022</td>
</tr>
<tr>
<td>Michael E. Hill of Washington, D.C. and</td>
<td></td>
</tr>
<tr>
<td>Chautauqua, New York - ex officio</td>
<td>2, 3, 4, 5</td>
</tr>
<tr>
<td>Nancy Kyler of Staunton, VA</td>
<td>1, 2, 7 2024</td>
</tr>
<tr>
<td>Craig Marthinsen of Toronto, Ontario</td>
<td>1, 4, 5, 7 2022</td>
</tr>
<tr>
<td>Anne Odland of Washington, D.C.</td>
<td>1, 3, 4 2022</td>
</tr>
<tr>
<td>Chair, Audit Committee</td>
<td></td>
</tr>
<tr>
<td>M. Timothy Renjilian of Atlanta, Georgia</td>
<td>1, 2, 3, 4, 5, 6, 7 2023</td>
</tr>
<tr>
<td>Chair, Executive Committee</td>
<td></td>
</tr>
<tr>
<td>Chair, Board of Directors</td>
<td></td>
</tr>
<tr>
<td>Anne Hoyt Scavone of New York, New York</td>
<td>2, 6, 7 2022</td>
</tr>
<tr>
<td>Sheila Schroeder of San Francisco, California</td>
<td>1, 3, 5, 6 2021</td>
</tr>
<tr>
<td>George T. Snyder of Pittsburgh, Pennsylvania</td>
<td>1, 3, 4, 7 2021</td>
</tr>
<tr>
<td>Chair, Personnel Committee</td>
<td></td>
</tr>
<tr>
<td>Stephen J. Zenczak of Washington, D.C.</td>
<td>1, 3, 4 2023</td>
</tr>
<tr>
<td>Chair, Finance Committee</td>
<td></td>
</tr>
</tbody>
</table>

#### Officers

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>M. Timothy Renjilian</td>
<td>Chair</td>
</tr>
<tr>
<td>Karen J. Goodell</td>
<td>Vice Chair</td>
</tr>
<tr>
<td>Stephen J. Zenczak</td>
<td>Treasurer</td>
</tr>
<tr>
<td>Deborah E. Moore, CPA</td>
<td>Executive Director</td>
</tr>
<tr>
<td>Theresa Frangione</td>
<td>Corporate Secretary</td>
</tr>
</tbody>
</table>

#### Staff

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jennifer L. Burgeson</td>
<td>Fund Accountant</td>
</tr>
<tr>
<td>Theresa M. Frangione</td>
<td>Corporate Secretary and Executive Assistant to the Institution’s Senior VP and Chief Advancement Officer</td>
</tr>
<tr>
<td>Deborah E. Moore, CPA</td>
<td>Executive Director</td>
</tr>
</tbody>
</table>

#### Committees

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

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

Former Directors and Terms of Service

Wilson C. Price • May 1937 to August 1962
Mrs. E. J. Bellinger • August 1937 to October 1963
Mrs. L. D. Boal • August 1937 to August 1955
Samuel M. Hazlett • August 1937 to July 1956
James H. Matthews • August 1937 to 1939
Walter Roberts • August 1937 to March 1959
David L. Starr • August 1937 to 1951
Mrs. Livingston Hunter • August 1939 to 1942

Harold F. Reed, Jr. • August 1937 to August 1957
Walter R. Quintus Anderson
Hal A. Fausnaugh
Eugene S. Cohen

August 1951 to August 1971

Mary Frances Cram • August 1950 to September 1954
Harold F. Reed • August 1951 to August 1971
Mrs. Walter F. Rittman • August 1955 to January 1964
Paul N. Anderson • August 1955 to August 1965
Walter C. Shaw, Jr. • August 1956 to August 1974
John D. Hamilton • July 1959 to August 1971
Samuel P. Price, Sr. • August 1962 to August 1995
Mrs. Dorothy W. Cook • August 1964 to August 1987
Lewis W. Morgan • August 1964 to August 1990
Nancy Miller Arm • August 1965 to August 1989
Richard H. Miller • August 1971 to August 1996
J. Donald Patton • August 1971 to August 1984
Howard G. Gibbs • August 1974 to August 1990
Oscar E. Remick • September 1975 to December 1976
Robert S. Bargar • August 1976 to August 1994
Mrs. Mary B. McDowell • August 1976 to August 1982

John S. Rogers • August 1976 to August 1986
David H. Camahan • August 1976 to January 2000
George L. Cornell • August 1976 to August 2001
Joseph A. Neubauer • August 1977 to November 1983
Robert R. Hesse • January 1978 to November 1983
Richard L. Bechtolt • August 1982 to July 2006
Daniel L. Bratton • December 1983 to December 2000
Edward P. Boyle • August 1984 to August 1994
Frank E. McElree, Jr. • August 1984 to August 1996
H. David Faust • August 1986 to June 1988
Mary Frances Cram • August 1987 to August 1993
Robert B. Osburn • August 1989 to August 1996
Harold F. Reed, Jr. • August 1989 to August 2001
Eugene S. Cohen • August 1990 to August 1998
George L. Follansbee, Jr. • August 1990 to March 2004
Hal A. Fausnaugh • April 1990 to August 1994
R. Quintus Anderson • April 1991 to August 1995

August 1995 to August 2011

William F. Hill, II • April 1991 to August 2005
Patricia Goldman • August 1992 to August 2003
Marilyn G. Levinson • August 1992 to August 2000
William H. Park • August 1993 to August 2005
William R. Goodell • August 1994 to August 2019
James G. Groninger • August 1994 to August 2014
William G. Karaske • August 1994 to August 1995
Thomas R. Bromeley • August 1995 to June 2001

August 2000 to November 2003

Wendy Cohen • August 2001 to May 2011
Scott McVay • January 2001 to December 2003
Allen Short • August 2001 to August 2005
John S. Connolly, Jr. • August 2003 to August 2018
Fred C. Gregory • August 2004 to August 2008
Thomas M. Becker • January 2005 to December 2016
Christopher H. Lytle • February 2005 to August 2014
John W. Burden, III • August 2005 to October 2007
Kathryn J. Lincoln • August 2005 to December 2011
I. Hale Oliver • August 2005 to August 2013
George T. Snyder • August 2006 to August 2007
Lauren Rich Fine • August 2006 to August 2020
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
Cathy L. Bonner • August 2013 to August 2019
William James • August 2013 to August 2020
P. James Brady • August 2015 to August 2016
Georgia M. Court • August 2016 to October 2017
John A. Milos • August 2016 to August 2019
Richard Wade • August 2016 to August 2020

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

August 1957 to August 1967

Richard H. Miller
August 1971 to August 1996

Lowell K. Strohl
August 2000 to November 2003

Cathy L. Bonner
August 2016 to October 2017