

2020 REPORT ON PHILANTHROPY

Dear friends,

The report you are receiving is the GOOD NEWS of 2020.

To state the absurdly obvious, the year 2020 will be remembered as one of the most disruptive, painful, deadly years in history. COVID-19 shook our world. Much has been stated and written and much more will be. You do not need me to add to the body of analysis and opinion. Yet one cannot share the good news without acknowledging all that was lost.

For the first time since its founding in 1874, Chautauqua Institution did not bring people together in person to attend lectures, worship or experience the arts. With the advent of CHQ Assembly, the Institution brought speakers, preachers and artists into your homes. While the programs were satisfying and many were richly rewarding, everyone who has experienced Chautauqua in person knew we had lost that which makes Chautauqua the place it is — being together in community.

The Institution, itself, lost its primary source of revenue and overall saw a decline in revenue of approximately \$20 million. Management reduced expenses for the year by \$13 million.

You came to the rescue. Gifts to the Chautauqua Fund to cover operating expenses of the Institution increased by 36% in 2020. Many of you donated the refunds to which you were entitled by the cancellation of in-person convening, many of you increased your normal Chautauqua Fund contribution, and some of you did both. Many of you made your first gift to the Chautauqua Fund.



Your outpouring of support felt much like a love letter to Chautauqua. Your gifts demonstrated how much you cared for the Institution's well-being. Your gifts displayed how much you cared for the Institution's future. In the end, you allowed Chautauqua to plan and create a program for 2021 secure and confident that our risk was manageable.

Your generosity last year was not limited to the Chautauqua Fund. Many of you shared that you included Chautauqua in your estate plans. Some of you made outright gifts to further build Chautauqua's endowment. Chautauqua's endowment provides an increasingly important part of our annual revenue stream and in such uncertain times a critically reliable one. Last year, as in every year, the support of Chautauquans who had included Chautauqua in their estate plans became realized adding further to the results shown in this report to you and about you.

Thank you. Your thoughtfulness and spirit of care are overwhelming. As the fortunate leader of the advancement team that works closely with many of you, I know we are blessed to have the opportunity.

With warm regard and deep appreciation, I am

Very truly yours,

A handwritten signature in black ink that reads "Geof Follansbee".

Geof Follansbee

Senior Vice President and Chief Advancement Officer





CHAUTAUQUA INSTITUTION MISSION STATEMENT

Chautauqua Institution is a not-for-profit, 750-acre community on Chautauqua Lake in southwestern New York State, where approximately 7,500 persons are in residence on any day during a nine-week season, and a total of more than 100,000 attend scheduled public events.

Chautauqua is dedicated to the exploration of the best in human values and the enrichment of life through a program that explores the important religious, social and political issues of our times; stimulates provocative, thoughtful involvement of individuals and families in creative response to such issues; and promotes excellence and creativity in the appreciation, performance and teaching of the arts.



CHAUTAUQUA FOUNDATION MISSION STATEMENT

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

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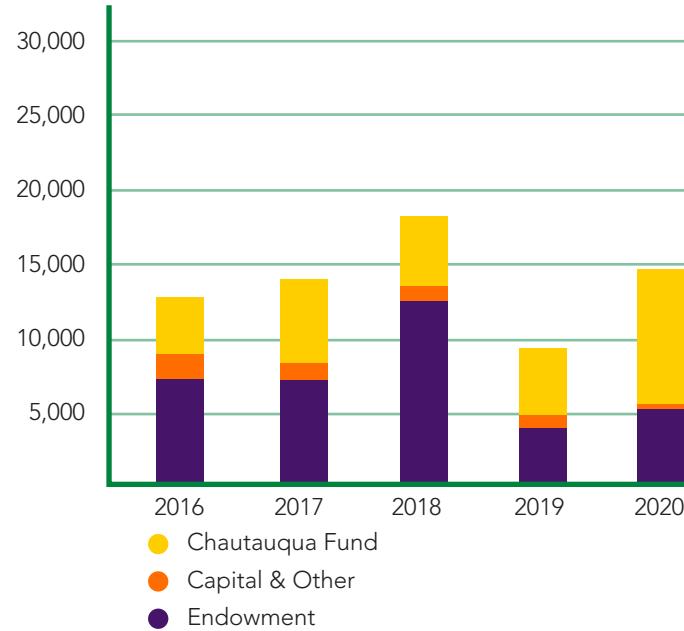
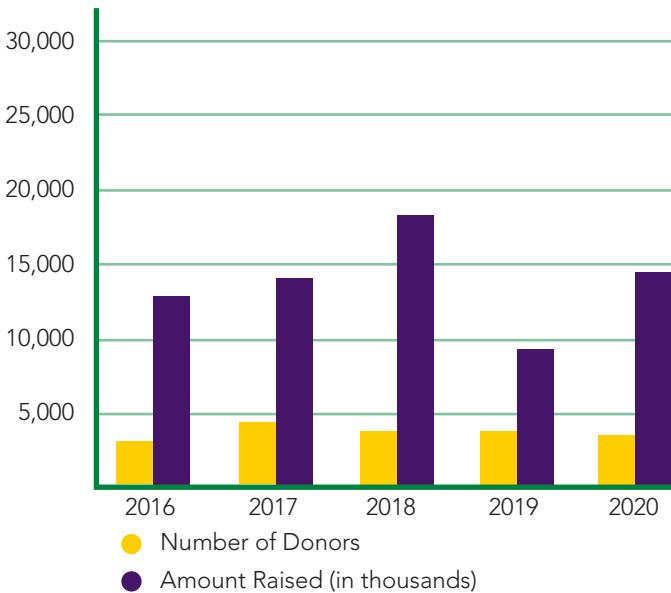


FUNDRAISING REPORT

Total Philanthropic Activity

In 2020, Chautauquans generously supported the Institution's mission with over \$14.65 million in total philanthropy, which includes pledges, outright gifts and planned gifts.

| Calendar Year | Chautauqua Fund | Endowment | Capital & Other | Total |
|---------------|-----------------|------------|-----------------|------------|
| 2020 | \$ 9,127,497 | 5,147,278 | 378,688 | 14,653,463 |
| 2019 | 4,552,551 | 3,890,926 | 889,722 | 9,333,199 |
| 2018 | 4,786,953 | 12,474,553 | 985,221 | 18,246,727 |
| 2017 | 5,696,084 | 7,149,967 | 1,173,107 | 14,019,158 |
| 2016 | 3,858,830 | 7,182,221 | 1,711,904 | 12,752,955 |



Generous philanthropy takes many forms at Chautauqua, and is unique to each person inspired to give. There are three categories of giving, including contributions to the annual Chautauqua Fund, endowment, and capital and other projects.

Chautauqua Fund

All gifts to the Chautauqua Fund are used to support the Institution's annual operating budget and the full range of programming Chautauqua offers.

Donors who contributed to the 2020 Chautauqua Fund are recognized on pages 20–40.

Endowment

All gifts to endowment are made to the Foundation for investment and then made available to the Institution according to the spending policy established by the board of directors of the Foundation.

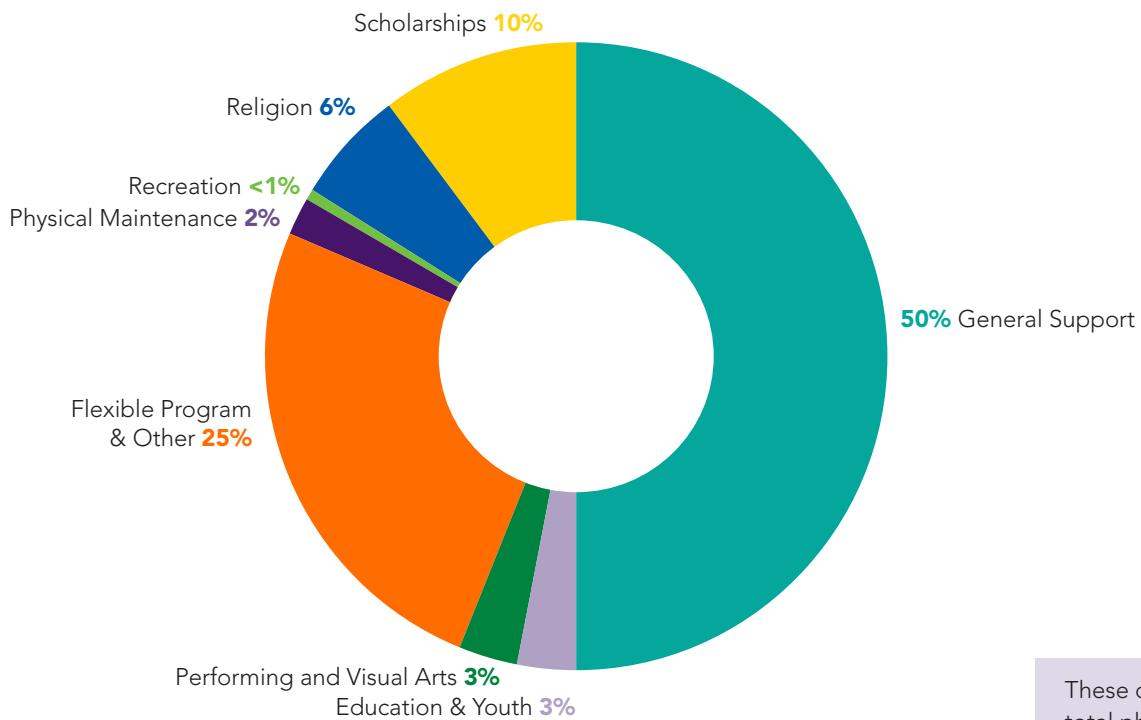
Donors who made endowment gifts in the calendar year 2020 are recognized on pages 41–45.

Capital & Other

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

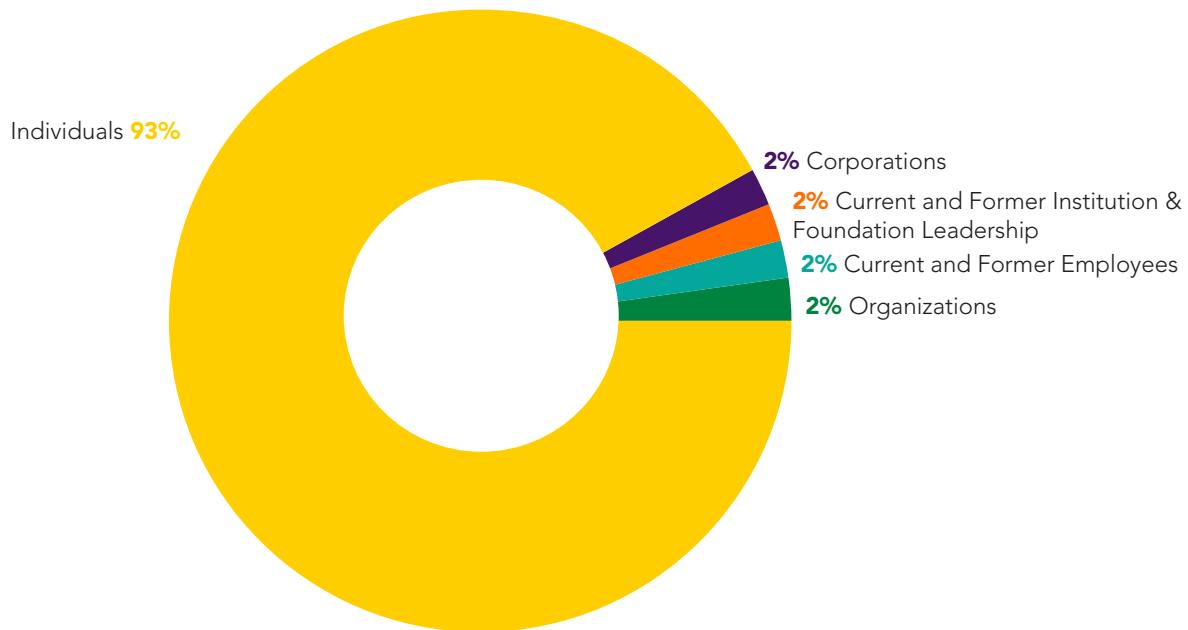
Donors who made capital or other programs in 2020 are recognized on page 46.

Total Giving by Area of Support

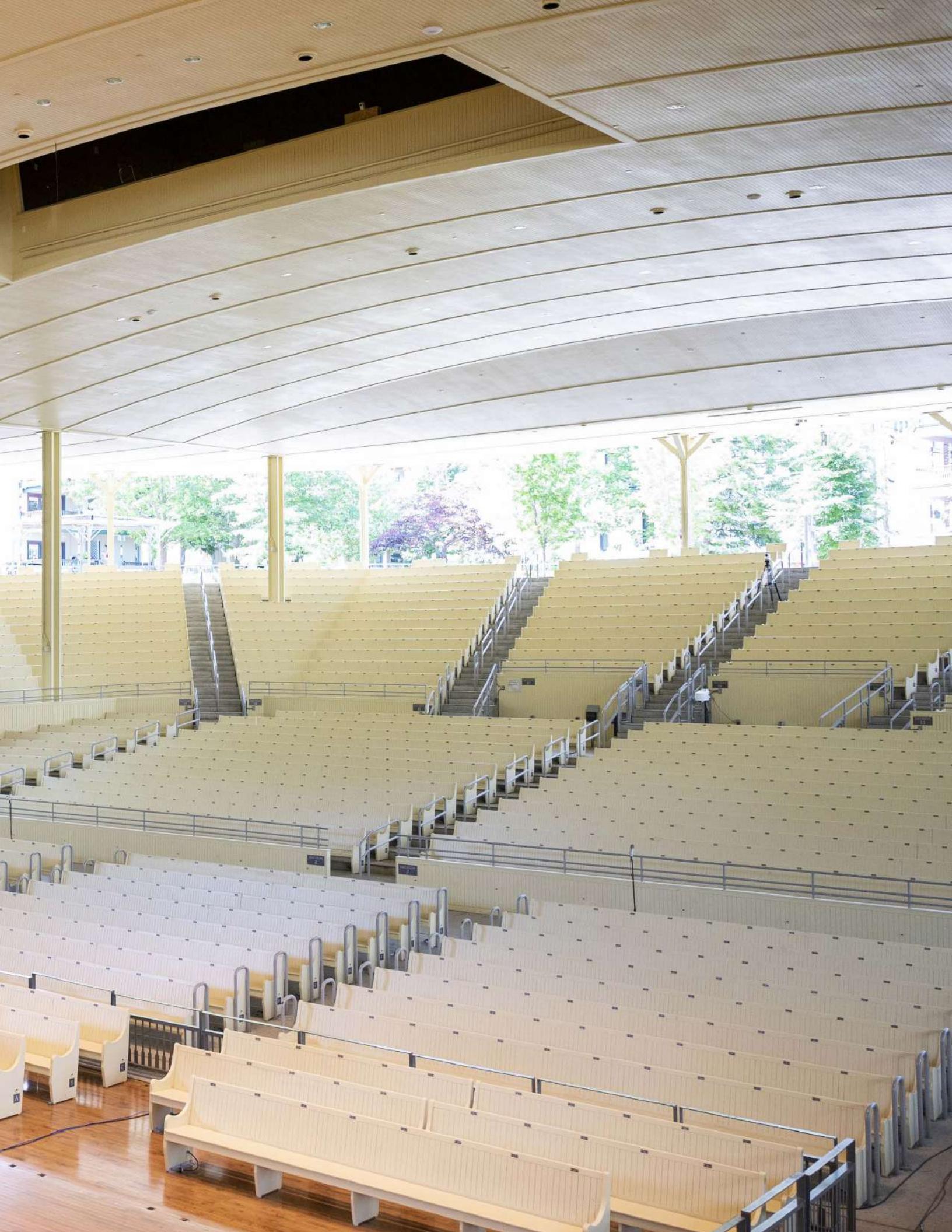


These charts represent total philanthropy of \$14.65 million for the calendar year ended Dec. 31, 2020 by area and type of support.

Who Supports Chautauqua?







LIFETIME GIVING

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

Donors new to this list are highlighted in green.

Greater than \$5,000,000

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

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

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Ralph C. Sheldon Foundation, Inc.
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Lowell and Rebecca Strohl and
Family
Helen Truman Trust

\$1,000,000-\$2,499,999

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Jean and Tom Bromeley
Mrs. Robert D. Campbell
Chautauqua Women's Club, Inc.
Margaret Clarkson and George
Heintzelman
Mr. and Mrs. George L. Cornell
Mr. and Mrs. Robert W. Cornell
Dr. and Mrs. R. William Cornell
Mr. and Mrs. Joseph H. DeFrees
Mrs. Grant A. Dibert
Lauren Rich Fine
Mr. and Mrs. Robert K. Fletcher
Char and Chuck Fowler

Barbara and Peter Georgescu

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William R. Goodell
Donna Kohl
Stewart Kohl
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The Kresge Foundation
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The Milton and Tamar Maltz Family
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Ralph H. and Elizabeth C. Norton
Philanthropic Trust
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Rosalie H. Pembridge
Steve and Polly Percy
Martha and Harold F. Reed, Jr.
Mr. and Mrs. Robert M. Smith
Sydelle Sonkin and Herb Siegel
Mr. and Mrs. Ralph Swingle
Robert and Joyce Tate Family
Foundation

\$500,000-\$999,999

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Andrew L. and Gayle Shaw
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Wendy and Edward Cohen
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Mimi and Jim Gallo
Chip and Gail Gamble
General Electric Foundation
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Hirsh
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Lilly Endowment, Inc.
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Larry and Bonnye Roose
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Mr. and Mrs. J. Bruce Stromgren
Mr. and Mrs. Henry B. Suhr, Jr.
Town of Chautauqua
The Turney Family
Caroline Van Kirk Bissell
Dr. and Mrs. Robert J. Weiss
Mr. and Mrs. Robert O. Wilder
Steve Zenczak and Pat Feighan



\$250,000–\$499,999

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Edward L. Anderson and Joan E.
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John and Barbara Anderson
Clement and Karen Arrison
Foundation
Penny Bank
Arthur and Barbara Banner
Wendy and David Barenfeld
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June Bonyor
Mary Boyle and Ted Arnn
P. James and Barbara A. Brady
Twig and Barbara Branch
Mr. and Mrs. John E. Britton
The Byham Family
Chautauqua County Visitors'
Bureau
Chautauqua Dance Circle
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Marty and Sandy Coyle
The Crockett Family
Kevin and Karen Crowder
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Laura and Brad Currie
The Jessie Smith Darrah Fund
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Arthur E. Earley
Ted and Deborah First
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Dr. and Mrs. Mark Foglesong
Jane Fortune
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S. Allen Goodwin
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Kathleen E. Hancock
Ms. Verna Harrah
Lisa Heinz
The Hermance Family Foundation
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Innes
Bill and Angela James
Bob Jeffrey
The Johnson Foundation
W. Alton Jones Foundation
Kevin and Joan Keogh
Ron and Rosie Kilpatrick
William M. Kinley
Mary Kuhns Trust
Blossom Leibowitz
J. Stoner Lichty, Jr. and Darryl L.
Raszl, M.D.
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Kathryn Lincoln
James H. Lynch, Jr.
Alison and Craig Marthinsen
Chris and Sue Martin
Warren K. Martin
Dr. and Mrs. Frank E. McElree, Jr.
Edward and Betsy Merchant
Cornelia Chason Miller
Ministrare, Inc.
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Mr. and Mrs. Lewis W. Morgan
National Endowment for the Arts
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Jeffrey N. Lutz
The John R. Oishei Foundation
The Estate of Gail Clement Olson
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Kathy and Jim Pender and the
Michael Pender Memorial Fund
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Mrs. Bartlett Richards
Molly F. Rinehart and Charles L.
Christian
Marjorie McCarthy Robins
Joseph H. and Florence E. Roblee
Foundation
Herbert B. and Gerda Sachse
Louis F. Schauer
Dr. Robert G. and Katy T. Smith
Sutton Trust
Brenda and Larry Thompson
Susan and John Turben
Foundation
Rev. George E. Tutwiler
VACI Partners
Tara VanDerveer
John and Linda Wadsworth
Edris and David H. Weis
Norman and Marilyn Weizenbaum
The Margaret L. Wendt
Foundation
The Mary S. Wilsdon Trust
Virginia H. and Robert R. Young
Mr. and Mrs. Howard Zemsky
Shirley and Sam Zemsky



2020 PHILANTHROPY AT CHAUTAUQUA

The following list recognizes with profound gratitude the collective giving of all donors who made a contribution of \$5,000+ to one or more philanthropic areas in the calendar year 2020.

Greater than \$500,000

Thomas B. Hagen
Bruce and Sarah Hagen
McWilliams
Harold F. Reed, Jr.

Jack Connolly
Erie Insurance Group
Mimi and Jim Gallo
Mr. and Mrs. G. Thomas Harrick
Marsha L. Haug
Karin A. Johnson
Dr. Barb Mackey
Joanna and Kenneth Nilsen
Ralph H. and Elizabeth C.

Roe Green
Craig and Cathrine Greene
Izumi Hara and David Koschik
+ Rosie and Ron Kilpatrick
Joan G. Kissner
Judy and Jim Kullberg
Mr. and Mrs. Dayton Mak
New York State Council on the Arts
Richard J. Osborne
The Mary and James Pardo Charitable Gift Fund
Steve and Polly Percy
Ralph C. Sheldon Foundation, Inc.
The Carter Smith Family
Sutton Trust
Mark and Patt Suwyn
Town of Chautauqua
Susan and John Turben Foundation
VACI Partners
The Watters Family
Edris and David H. Weis
Christina and Scott Worley

\$250,000–\$499,999

The Hultquist Foundation, Inc.
Jeff Innes and Sue Hammond Innes
Mr. and Mrs. Bartlett Richards, III
Louis F. Schauer
Mr. and Mrs. Richard K. Smucker
Rev. George E. Tutwiler

Norton Philanthropic Trust
M. Cathy Nowosielski, MD and Jeffrey N. Lutz
Ed Paul
Sheila Penrose and Ernie Mahaffey
The Paul and Marnette Perry Family Fund
The Reeve Family
Brenda and Larry Thompson VanDerveer/Tucker Charitable Fund
Richard and Debra Wade Charitable Fund
Steve Zenczak and Pat Feighan

\$100,000–\$249,999

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Sarah Blackmun and Steve Eskow
Wendy H. Cohen Fund
Joe and Pam Kanfer
Lippman Kanfer Family Foundation
Betsy and Ted Merchant
Don and Alyce Milks
Peter Nosler and Julie Veitch
Janet and Karl Reuter
John and Takako Sachse
Kimberly Sachse
Helen Truman Trust

Anonymous
Maizie Abuza
Nan and Brett Altman
Penny Bank
Elise M. Besthoff Charitable Foundation, Inc.
Kathy and James Braham
Chautauqua Dance Circle
Kevin and Karen Crowder
Laura and Brad Currie
The Winifred C. Dibert Foundation, Inc.
Ted and Deborah First
Barbara and Peter Georgescu

\$25,000–\$49,999

Anonymous
Mary Bucher
Mrs. Frederick Cheney
Margaret Clarkson and George Heintzman

\$10,000–\$24,999

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Applequist Family Charitable Fund
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Nancy C. Bechtolt
Arnold and Jill Bellowe
Dave and Lauren Benson
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Kathy and Rick Birkett
Barbara A. Black
Bill and Peggy Blackburn
The Felicia & Robert Bloom Charitable Foundation
Mary Boyle and Ted Arnn
Jim and Barbara Brady
Laurie Branch and Family
Twig and Barbara Branch
Gary and Willow Brost Charitable Fund
Steven and Cynthia Brown
Felix M. Brueck and Ann Kowal Smith Charitable Fund



(+) indicates those who have maximized the impact of their generosity through a corporate matching gift

(#) identifies members of the NOW Generation, made up of Chautauquans ages 21–40

John W. and Anne Staples
Burden
Dr. & Mrs. Vincent & Kathryn A.
Butera
Andrew L. and Gayle Shaw
Camden
Rev. Dr. Joan Brown Campbell
and Rev. Dr. Albert M.
Pennypacker
The Children's Guild
Foundation
Dr. and Mrs. R. William Cornell
Ellis and Betsy Cowling Fund
of the Triangle Community
Foundation
+ The William A. and Deborah E.
Currin Philanthropic Fund
+ Jim and Karen Dakin
The Jessie Smith Darrah Fund
+ John and Marilyn Dilley
Lora Lee and Bob Duncan
Michael and Cynthia Evanisko
Charitable Gift Fund
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Nancy Waasdorp
Katherine Karslake White
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\$5,000-\$9,999

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George and Melissa Orlov
Robert and Barbara Park Fund
Mike and Judy Patton
+ David and Jill Peckinpaugh



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Charles J. Smith Trust
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S. Sonja Smith
George and Maggie Snyder
David Solosko and Sandra
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Weitzel
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Allen and Margaret Steere
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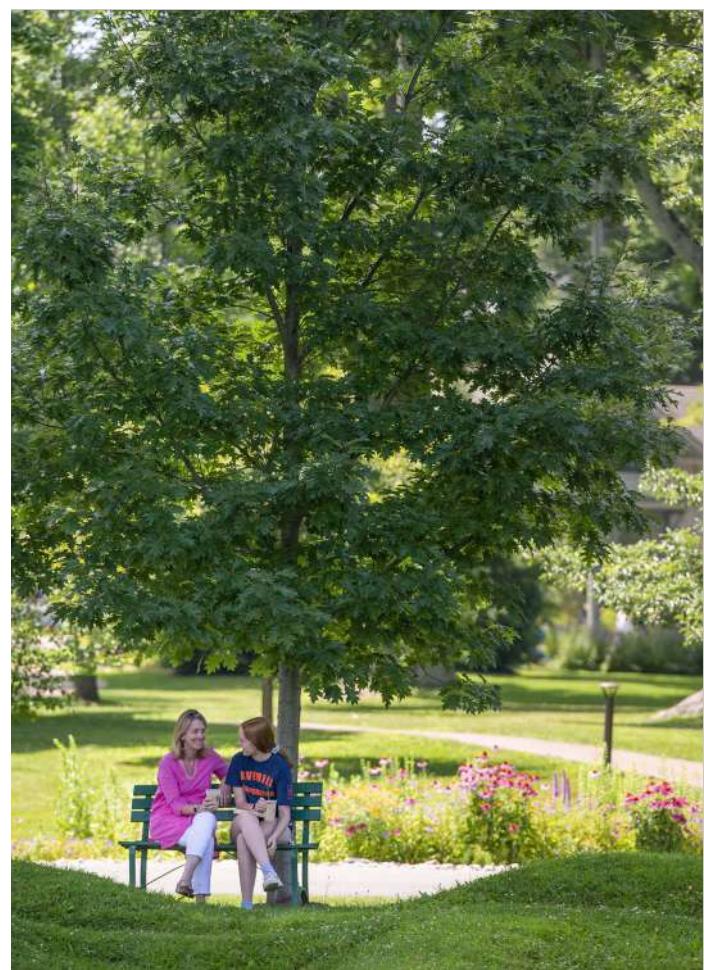
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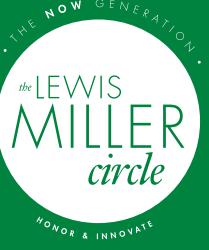
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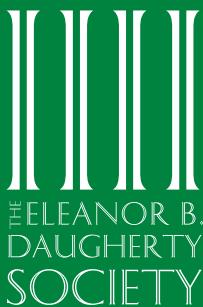
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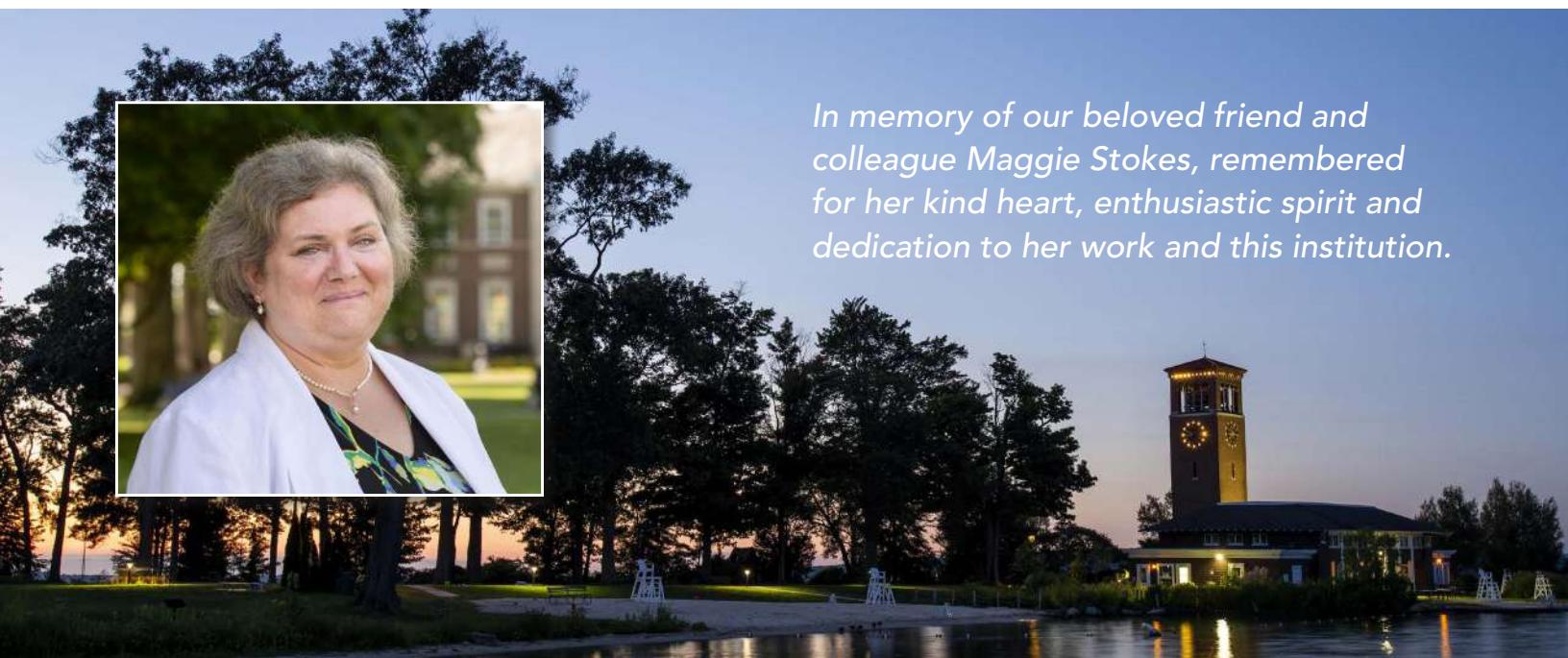
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