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</tr>
</tbody>
</table>
**MISSION STATEMENT**

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

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

**STATEMENT OF PURPOSE**

Article II, Corporate Charter May 14, 1937

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

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

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

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

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

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

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

VI  To do all lawful things proper or needful to accomplish the purposes herein before expressed.
On behalf of the Chautauqua Foundation, we are pleased to present this 2022 Annual Report that highlights our continued work to uphold our mission of supporting Chautauqua Institution’s programs and initiatives. As stewards of the endowment, we remain focused on preserving the endowment funds entrusted to us by many generous donors. Sound investment management protects the original gift corpus and grows the endowment’s value to maintain purchasing power, all with the objective of helping provide long-term support and stability to the Institution.

The last several years have provided ample evidence of the endowment’s critical importance. From the pandemic, to security issues, to environmental events, to new financial pressures, Chautauqua’s mission is increasingly confronted by a variety of unpredictable threats. The one sure approach for managing and mitigating such risks is to have a dependable revenue source that can provide reliable support for the core operations and activities of the Institution. That revenue source is the endowment.

In 2022, the Chautauqua Foundation provided more than $4 million in crucial support to the Institution. As important as that funding was, it represented only about 10% of the Institution’s 2022 operating expenses. To adequately secure Chautauqua’s future, that percentage will need to grow substantially over time.

While providing meaningful annual funding to the Institution is a key focus of our work — and a key expectation of our donors — taking a prudent and balanced approach to payout is also essential. To that end, the Foundation has used a payout formula that prioritizes predictable and growing cash flow to the Institution while also ensuring the long-term maintenance and growth of our endowment corpus. We have kept within the guardrails of that formula throughout the recent turbulent years, keeping an eye on the long term even as we work closely with our Institution colleagues to help navigate through near-term challenges. We will continue to do so in the future.
Despite the difficulties presented by global market fluctuations, the endowment investment portfolio performed admirably over the past year, exceeding the composite benchmark each quarter and at year-end. 2022 was a historically difficult year for the financial markets globally, but our prudent investment strategies and diversified approach have helped us navigate the uncertainties and volatility of the unpredictable financial landscape, and we’re pleased to report that, through this point of 2023, the endowment has largely recouped the losses endured in 2022. The portfolio has been constructed for long-term sustainability to ride out short-term market fluctuations and capitalize on compounding returns over time. Its performance against benchmarks in 2022 underscores the wisdom of this long-term strategy.

The endowment principal has continued to grow, with $4.4 million in new contributions in 2022 provided by Chautauquans who are focused on the long-term mission and health of Chautauqua. The new gifts will allow us to support the broad range of programming that so many Chautauquans enjoy each year, and will also help maintain the essential infrastructure of our historic grounds, including buildings and public spaces. Through this combination of new gifts and thoughtful oversight, we aim to secure the Institution’s future and preserve its unique contributions to all four of its core pillars: Arts, Education, Recreation and Religion.

In addition to our standard annual independent audit of the 2022 financial statements, we continued our discipline of engaging outside auditors on a periodic basis to perform enhanced procedures, confirming that our distribution of funds was consistent with the terms of our donor agreements. We worked closely with the audit firm to develop a detailed plan for these procedures to ensure that we provide needed support to the Institution while adhering to donor intent.

We were fortunate to welcome another outstanding slate of new directors in 2022, restoring the Board of Directors to full capacity after an intentional delay in filling positions as we navigated the COVID-19 pandemic. With the expertise of our new and veteran directors, the board is positioned to oversee the important work of the Foundation and the continued growth of the endowment.

In closing, we would like to express our immense gratitude to our passionate donors and to the entire Chautauqua community for your incredible support of the Foundation and the Institution. Together, we are creating a lasting impact and enriching lives through the power of ideas, learning and creativity. We look forward to the opportunities that lie ahead and remain committed to playing our role in advancing Chautauqua Institution’s legacy for the next 150 years and beyond.

Sincerely,

[Signature]

Deb E. [Name]
Financial Overview

After three consecutive years of double-digit annual net returns, the endowment portfolio experienced a correction of 15.5% in 2022, which contributed to a $22 million decrease in the net assets of the Foundation. Other financial activity for 2022 was positive with the Foundation receiving $4.4 million in endowment gifts, making $4.4 million of endowment payout available to the Institution in accordance with the spending policy of the Foundation, and maintaining an administration expense level well below 1% of endowment net assets.

Foundation Net Assets

Total net assets of the Foundation are comprised of gifts already received and the net appreciation of those gifts, as well as the net discounted value of certain commitments. The net assets of the Foundation have increased by $54 million from $64 million as of March 31, 2012 to $118 million as of December 31, 2022.
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. Funds providing general support are used in their entirety each year, providing the most valuable type of support to the sustainability of the Institution. Within the various program areas, certain funds provide for support of the general program area, while other funds have more specific restrictions. The Foundation carefully reviews the use of each endowment fund in accordance with the documented intentions of the donors.

The chart below represents the allocation of the total net asset balances of 794 active endowment funds as of December 31, 2022, by area of support.

Number of Active Endowment Funds

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/31/19</td>
<td>743</td>
</tr>
<tr>
<td>12/31/19</td>
<td>765</td>
</tr>
<tr>
<td>12/31/20</td>
<td>775</td>
</tr>
<tr>
<td>12/31/21</td>
<td>788</td>
</tr>
<tr>
<td>12/31/22</td>
<td>794</td>
</tr>
</tbody>
</table>
Endowment Fundraising Objectives
There are two objectives for endowment fundraising: to receive gifts to be added to the endowment each year and to build a pipeline of endowment gift commitments to be received in future years.

Endowment Cash Received
Gifts added to endowment are comprised of the outright gifts received, pledge payments and realized planned gifts.

Endowment Commitments
Future commitments are comprised of cash pledges with specific payment schedules and planned gift commitments to be received according to the individual provisions of the donors’ estate plans.
Future Commitments to Endowment

The cumulative amount of future commitments to the Foundation was $68.5 million as of December 31, 2022, as depicted in the chart below. These stated intentions of donors include both conditional and unconditional commitments.

The unconditional commitments have a total gross value of $12.8 million and are recorded in the financial statements at net discounted values of $554,000 for cash pledges and $4.3 million for split-interest agreements. The split-interest agreements include gifts to the pooled life income fund, irrevocable trusts and the gift annuity program at the National Gift Annuity Foundation.

The conditional commitments are not recorded in the financial statements and have a total gross value of $55.2 million, which represents bequests, revocable trusts and beneficial interests.
Investment Summary

The Foundation Board of Directors establishes the financial and investment objectives of the endowment portfolio and the Investment Committee implements the responsibilities delegated to it by the Board: selecting investment managers, making asset allocation decisions and monitoring performance.

Hirtle Callaghan & Co., LLC serves as the Foundation’s Outsourced Chief Investment Officer and actively manages the majority of the endowment portfolio, two portfolios comprised of other restricted funds, and the Environmental, Social and Governance (ESG) investment portfolio.

The main endowment portfolio has a diversified asset allocation and includes an investment in a fund of hedge funds, which is managed by Pointer Management, LLC. The two portfolios for other restricted funds have conservative investment strategies primarily held in cash with some investment in bonds. The ESG portfolio is comprised 80% of ESG Equities and 20% U.S. Treasury Fixed Income.

The Investment Committee also has oversight responsibility for the pooled life income fund, which is managed by Key Private Bank. As of December 31, 2022, 46% of the PLIF assets were invested in equities, 48% in fixed income and 6% in real assets.

Endowment Asset Allocation

The main endowment portfolio market value was $111.9 million as of December 31, 2022, and has a diversified asset allocation.
**Investment Management**

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 and a composite benchmark that reflects the asset allocation is used to evaluate performance. Investment performance is measured on a net basis, defined as total time weighted return after all investment management fees.

**Endowment Investment Portfolio**

The chart below represents the endowment comprised of the main investment portfolio, the ESG portfolio, and the hedge fund portfolio. The endowment has grown by $72.5 million, from $39.4 million as of March 31, 2002 to $111.9 million as of December 31, 2022.
Annual Endowment Performance

After three consecutive years of double-digit returns, the endowment portfolio experienced an adjustment in 2022 consistent with market conditions. Such volatility is expected and actually provides investment opportunities for future growth in the portfolio, which is why the Investment Committee takes a long-term approach, over full market cycles, to assess the performance of the main endowment portfolio. 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. The portfolio has continuously exceeded the benchmark for 10-year annualized returns.

10-Year Annualized Returns

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10-Year Return</td>
<td>7.6%</td>
<td>6.3%</td>
<td>5.6%</td>
<td>4.3%</td>
<td>3.6%</td>
<td>4.0%</td>
<td>7.2%</td>
<td>6.8%</td>
<td>7.1%</td>
<td>9.0%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Benchmark</td>
<td>6.7%</td>
<td>5.9%</td>
<td>4.9%</td>
<td>4.0%</td>
<td>3.0%</td>
<td>3.7%</td>
<td>6.7%</td>
<td>6.5%</td>
<td>6.7%</td>
<td>8.2%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>
Financial Objective of Endowment Investment Program

Endowment assets change during the year by gifts received, net investment income (loss) and total spending appropriated by the Foundation Board of Directors. Spending includes the operating expenses of the Foundation and endowment payout to the Institution, which is determined in accordance with the constant growth spending method and does not directly correlate with investment performance, allowing the Institution to be able to plan on a constantly increasing stream of revenue. The Foundation monitors the spending within the provisions of the Prudent Management Act to protect the original gifted value and provide growth to maintain purchasing power.

### 2021 Endowment Asset Activity

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Investment Income</th>
<th>Spending</th>
<th>Endowment as of 12/31/2021</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>$113M</td>
</tr>
<tr>
<td>$5M</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 2022 Endowment Asset Activity

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Investment Loss</th>
<th>Spending</th>
<th>Endowment as of 12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>$112M</td>
</tr>
<tr>
<td>($5M)</td>
<td>($5M)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The overall goal of the Chautauqua Foundation long-term endowment investment program is to maintain and grow the real market value of investable endowment assets while providing a relatively predictable and growing stream of revenue to Chautauqua Institution. Over the past 10 years the endowment has doubled, from $55 million to $112 million. This chart shows the receipt of $48 million in contributions and net investment income exceeding spending by $9 million, growing the real market value to maintain purchasing power, while also supporting total spending of $41 million over 10 years.

### Cumulative 10-Year Activity

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Investment Income</th>
<th>Spending</th>
<th>Endowment as of 12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>$112M</td>
</tr>
<tr>
<td>($43M)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Investment Income</th>
<th>Spending</th>
<th>Endowment as of 12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>($5M)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Investment Income</th>
<th>Spending</th>
<th>Endowment as of 12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>$112M</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Investment Income</th>
<th>Spending</th>
<th>Endowment as of 12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>$55M</td>
<td></td>
<td></td>
<td>$55M</td>
</tr>
</tbody>
</table>

Increase  
Decrease
The Audit Committee reviewed and discussed the audited financial statements for the year ended December 31, 2022, 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.

Opinion
We have audited the statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of December 31, 2022 and 2021, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Foundation as of December 31, 2022 and 2021, and the changes in its net assets and cash flows for the years then ended, in accordance with accounting principles generally accepted in the United States of America (GAAP).

Basis for Opinion
We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditors’ Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Foundation, and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements
Management is responsible for the preparation and fair presentation of the financial statements in accordance with GAAP, and for 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.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Foundation’s ability to continue as a going concern for one year after the date the financial statements are issued.

Auditors’ Responsibilities for the Audit of the Financial Statements
Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors’ report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.
In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.

- Obtain an understanding of internal control relevant to the audit 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 Foundation’s internal control. Accordingly, no such opinion is expressed.

- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.

- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Foundation’s ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

April 24, 2023
## STATEMENTS OF FINANCIAL POSITION

**December 31, 2022**

### Assets:

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$468,951</td>
<td>$1,250,851</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>554,319</td>
<td>941,680</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>113,209,818</td>
<td>133,861,941</td>
</tr>
<tr>
<td>Split-interest agreements</td>
<td>4,306,883</td>
<td>5,236,353</td>
</tr>
<tr>
<td>Other assets</td>
<td>582,725</td>
<td>425,519</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$119,122,696</strong></td>
<td><strong>$141,716,344</strong></td>
</tr>
</tbody>
</table>

### Liabilities and Net Assets:

#### Liabilities:

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable to the Institution (Note 4)</td>
<td>$1,133,249</td>
<td>$1,428,028</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>54,847</td>
<td>53,970</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>1,188,096</strong></td>
<td><strong>1,481,998</strong></td>
</tr>
</tbody>
</table>

#### Net Assets (Note 5):

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without donor restrictions</td>
<td>6,358,897</td>
<td>6,885,646</td>
</tr>
<tr>
<td>With donor restrictions</td>
<td>111,575,703</td>
<td>133,348,700</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>117,934,600</strong></td>
<td><strong>140,234,346</strong></td>
</tr>
</tbody>
</table>

**Total**                                       | **$119,122,696** | **$141,716,344** |
For the year ended December 31, 2022

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td>$751,734</td>
<td>$3,630,602</td>
<td>$4,382,336</td>
</tr>
<tr>
<td>Other</td>
<td>$69,683</td>
<td>$69,683</td>
<td>$69,683</td>
</tr>
<tr>
<td>Change in value of</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>split-interest agreements</td>
<td>-</td>
<td>$(934,470)</td>
<td>$(934,470)</td>
</tr>
<tr>
<td>Investment income (loss)</td>
<td>$(1,042,411)</td>
<td>$(19,594,799)</td>
<td>$(20,637,210)</td>
</tr>
<tr>
<td>Total revenues</td>
<td>$(290,677)</td>
<td>$(16,828,984)</td>
<td>$(17,119,661)</td>
</tr>
</tbody>
</table>

Expenses:

| Program: |                          |                         |       |
| Endowment direct support | $4,423,856               | -                        | $4,423,856 |
| Support from other funds | $15,790                  | -                        | $15,790 |
| General and administrative | $740,439                | -                        | $740,439 |
| Total expenses | $5,180,085            | -                        | $5,180,085 |

Net assets released from restrictions | $4,944,013               | $(4,944,013)            | -       |

Change in net assets | $(526,749)              | $(21,772,977)           | $(22,299,726) |

Net assets - beginning | $6,885,646              | $133,348,700            | $140,234,346 |

Net assets - ending | $6,358,897              | $111,575,703            | $117,934,600 |
For the year ended December 31, 2021

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td>$ 246,231</td>
<td>$ 3,846,693</td>
<td>$ 4,092,924</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>14,046</td>
<td>14,046</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>431,661</td>
<td>431,661</td>
</tr>
<tr>
<td>Investment income (loss)</td>
<td>889,938</td>
<td>19,508,021</td>
<td>20,397,959</td>
</tr>
<tr>
<td>Total revenues</td>
<td>1,136,169</td>
<td>23,800,421</td>
<td>24,936,590</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>4,435,384</td>
<td>-</td>
<td>4,435,384</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>30,818</td>
<td>-</td>
<td>30,818</td>
</tr>
<tr>
<td>General and administrative</td>
<td>639,785</td>
<td>-</td>
<td>639,785</td>
</tr>
<tr>
<td>Total expenses</td>
<td>5,105,987</td>
<td>-</td>
<td>5,105,987</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>4,876,218</td>
<td>(4,876,218)</td>
<td>-</td>
</tr>
<tr>
<td>Change in net assets</td>
<td>906,400</td>
<td>18,924,203</td>
<td>19,830,603</td>
</tr>
<tr>
<td>Net assets - beginning</td>
<td>5,979,246</td>
<td>114,424,497</td>
<td>120,403,743</td>
</tr>
<tr>
<td>Net assets - ending</td>
<td>$ 6,885,646</td>
<td>$ 133,348,700</td>
<td>$ 140,234,346</td>
</tr>
</tbody>
</table>
# Statements of Cash Flows

For the years ended December 31,

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating activities:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td>$(22,299,746)</td>
<td>$19,830,603</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) losses</td>
<td>21,334,411</td>
<td>(19,390,892)</td>
</tr>
<tr>
<td>Changes in other operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>387,361</td>
<td>1,328,661</td>
</tr>
<tr>
<td>Receivable from split-interest agreements</td>
<td>929,470</td>
<td>(1,093,025)</td>
</tr>
<tr>
<td>Other assets</td>
<td>(157,206)</td>
<td>153,281</td>
</tr>
<tr>
<td>Payable to the Institution</td>
<td>(294,779)</td>
<td>226,116</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>877</td>
<td>3,754</td>
</tr>
<tr>
<td><strong>Net operating activities</strong></td>
<td>(99,612)</td>
<td>1,058,498</td>
</tr>
<tr>
<td><strong>Investing activities:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchases of investments</td>
<td>(14,653,253)</td>
<td>(18,403,389)</td>
</tr>
<tr>
<td>Proceeds from sales of investments</td>
<td>13,970,965</td>
<td>17,396,312</td>
</tr>
<tr>
<td><strong>Net investing activities</strong></td>
<td>(682,288)</td>
<td>(1,007,077)</td>
</tr>
<tr>
<td><strong>Net change in cash</strong></td>
<td>(781,900)</td>
<td>51,421</td>
</tr>
<tr>
<td>Cash - beginning</td>
<td>1,250,851</td>
<td>1,199,430</td>
</tr>
<tr>
<td>Cash - ending</td>
<td>$468,951</td>
<td>$1,250,851</td>
</tr>
</tbody>
</table>

**CHAUTAUQUA FOUNDATION**
1. Summary of Significant Accounting Policies:

Organization and Purpose
Chautauqua Foundation, Inc. (the Foundation) was established in 1937. The Foundation exists to support Chautauqua Institution (the Institution) through the preservation, the appropriate use, and the growth of endowment funds. The Institution recognizes its beneficial interest in the net assets of the Foundation in its separate financial statements.

Subsequent Events
The Foundation has evaluated events and transactions for potential recognition or disclosure through April 24, 2023, 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.

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 $55,187,000 and $58,148,000 at December 31, 2022 and 2021.

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 3).

Investment securities are exposed to interest rate, market, and credit risks. Due to the level of risk associated with certain investment securities and the level of uncertainty related to changes in the value of investment securities, it is at least reasonably possible that changes in values in the near term could materially affect the amounts reported in the accompanying financial statements.

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. Pursuant to the agreements, assets are recorded at the present value of the estimated future benefits to be received based on 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 $12,786,000 and $15,497,000 at December 31, 2022 and 2021.

Support to the Institution
Distributions from the donor 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.

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.
Investment activity reported in the statements of activities is as follows for the years ended December 31:

**2022**

<table>
<thead>
<tr>
<th>Description</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>$ 54,602</td>
<td>$ 642,599</td>
<td>$ 697,201</td>
</tr>
<tr>
<td>Net realized and unrealized losses</td>
<td>(1,097,013)</td>
<td>(20,237,398)</td>
<td>(21,334,411)</td>
</tr>
<tr>
<td></td>
<td>$ (1,042,411)</td>
<td>$ (19,594,799)</td>
<td>$ (20,637,210)</td>
</tr>
</tbody>
</table>

**2021**

<table>
<thead>
<tr>
<th>Description</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>$ 59,769</td>
<td>$ 947,298</td>
<td>$ 1,007,067</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>830,169</td>
<td>18,560,723</td>
<td>19,390,892</td>
</tr>
<tr>
<td></td>
<td>$ 889,938</td>
<td>$ 19,508,021</td>
<td>$ 20,397,959</td>
</tr>
</tbody>
</table>

As of December 31, 2022, the Foundation has committed capital of approximately $42,050,000 to private equity investments and the remaining obligation under these commitments totaled approximately $17,551,000. These investments generally cannot be redeemed. Distributions from these investments are received as underlying investments are liquidated. At December 31, 2022, 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:

**2022**

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>$ 64,948,383</td>
<td>$ 74,690,147</td>
</tr>
<tr>
<td>Quarterly</td>
<td>11,606,456</td>
<td>11,603,565</td>
</tr>
<tr>
<td>Semi-annually</td>
<td>14,379,312</td>
<td>21,206,070</td>
</tr>
<tr>
<td>Quarterly after initial lock-up period</td>
<td>-</td>
<td>3,000,000</td>
</tr>
<tr>
<td>Nonredeemable</td>
<td>22,275,667</td>
<td>23,362,159</td>
</tr>
<tr>
<td></td>
<td>$ 113,209,818</td>
<td>$ 133,861,941</td>
</tr>
</tbody>
</table>

**2021**

<table>
<thead>
<tr>
<th>Description</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>$ 59,171,794</td>
<td>$ 59,171,794</td>
</tr>
<tr>
<td>Quarterly</td>
<td>11,603,565</td>
<td>11,603,565</td>
</tr>
<tr>
<td>Semi-annually</td>
<td>21,206,070</td>
<td>21,206,070</td>
</tr>
<tr>
<td>Quarterly after initial lock-up period</td>
<td>-</td>
<td>3,000,000</td>
</tr>
<tr>
<td>Nonredeemable</td>
<td>23,362,159</td>
<td>23,362,159</td>
</tr>
<tr>
<td></td>
<td>$ 133,861,941</td>
<td>$ 133,861,941</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>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Endowment direct support</td>
<td>$1,099,296</td>
<td>$1,399,275</td>
</tr>
<tr>
<td>Other</td>
<td>33,953</td>
<td>28,753</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1,133,249</strong></td>
<td><strong>$1,428,028</strong></td>
</tr>
</tbody>
</table>

For the years ended December 31, 2022 and 2021, the Foundation agreed to reimburse the Institution in the amount of $250,000 for certain administrative costs incurred on behalf of the Foundation.

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>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board-designated endowments</td>
<td>$5,426,178</td>
<td>$5,860,050</td>
</tr>
<tr>
<td>Unrestricted gifts</td>
<td>932,719</td>
<td>1,025,596</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$6,358,897</strong></td>
<td><strong>$6,885,646</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>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$13,238,434</td>
<td>$31,499,707</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>3,523,898</td>
<td>9,318,108</td>
</tr>
<tr>
<td>Board-designated endowments</td>
<td>466,383</td>
<td>552,361</td>
</tr>
<tr>
<td>Other restricted gifts</td>
<td>349,558</td>
<td>291,550</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$17,578,273</strong></td>
<td><strong>$41,661,726</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 at December 31:

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$69,677,551</td>
<td>$67,191,014</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>24,319,879</td>
<td>24,495,960</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$93,997,430</strong></td>
<td><strong>$91,686,974</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 due to unfavorable market conditions. The Foundation permits spending from underwater endowment funds unless otherwise precluded by donor intent or relevant laws. As of December 31, 2022, there were 45 funds with a total original gift value of approximately $6,286,000 and a deficiency of $523,000.

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 each eligible employee's gross pay each year. Funded contributions and costs totaled approximately $23,000 and $22,000 for the years ended December 31, 2022 and 2021.
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. Endowment Assets:
The Foundation’s endowment assets are comprised of board-designated endowments and donor restricted endowments to be held in perpetuity. It is the Board’s policy to include in its board-designated endowment, any planned gifts received unless otherwise specified by the donor. Planned gifts with a donor-specified purpose are included in endowment assets with donor restrictions; if there is no donor-specified purpose, those assets are included in endowment assets without donor restrictions.

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 is as follows for the years ended December 31:

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Board-Designated</td>
<td>Board-Designated</td>
</tr>
<tr>
<td>2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment assets – beginning of year</td>
<td>$5,860,050</td>
<td>$552,361</td>
</tr>
<tr>
<td>Investment loss</td>
<td>(955,643)</td>
<td>(87,357)</td>
</tr>
<tr>
<td>Contributions</td>
<td>765,144</td>
<td>10,000</td>
</tr>
<tr>
<td>Other adjustments</td>
<td>(13,410)</td>
<td>13,410</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(229,963)</td>
<td>(22,031)</td>
</tr>
<tr>
<td>Endowment assets – end of year</td>
<td>$5,426,178</td>
<td>$466,383</td>
</tr>
<tr>
<td>2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment assets – beginning of year</td>
<td>$4,935,482</td>
<td>$486,848</td>
</tr>
<tr>
<td>Investment income</td>
<td>902,188</td>
<td>87,594</td>
</tr>
<tr>
<td>Contributions</td>
<td>240,880</td>
<td>-</td>
</tr>
<tr>
<td>Other adjustments</td>
<td>5,350</td>
<td>-</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(223,850)</td>
<td>(22,081)</td>
</tr>
<tr>
<td>Endowment assets – end of year</td>
<td>$5,860,050</td>
<td>$552,361</td>
</tr>
</tbody>
</table>
### 9. Expenses by Nature and Function:

<table>
<thead>
<tr>
<th></th>
<th>Program</th>
<th>General and Administrative</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund appropriations</td>
<td>$4,439,646</td>
<td>$0</td>
<td>$4,439,646</td>
</tr>
<tr>
<td>Personnel costs</td>
<td>$0</td>
<td>$340,357</td>
<td>$340,357</td>
</tr>
<tr>
<td>Institution supporting services</td>
<td>$0</td>
<td>$250,000</td>
<td>$250,000</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>$0</td>
<td>$43,113</td>
<td>$43,113</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>$0</td>
<td>$83,264</td>
<td>$83,264</td>
</tr>
<tr>
<td>Other</td>
<td>$0</td>
<td>$23,705</td>
<td>$23,705</td>
</tr>
<tr>
<td></td>
<td>$4,439,646</td>
<td>$740,439</td>
<td>$5,180,085</td>
</tr>
<tr>
<td>2021</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund appropriations</td>
<td>$4,466,202</td>
<td>$0</td>
<td>$4,466,202</td>
</tr>
<tr>
<td>Personnel costs</td>
<td>$0</td>
<td>$285,447</td>
<td>$285,447</td>
</tr>
<tr>
<td>Institution supporting services</td>
<td>$0</td>
<td>$250,000</td>
<td>$250,000</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>$0</td>
<td>$7,267</td>
<td>$7,267</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>$0</td>
<td>$67,741</td>
<td>$67,741</td>
</tr>
<tr>
<td>Other</td>
<td>$0</td>
<td>$29,330</td>
<td>$29,330</td>
</tr>
<tr>
<td></td>
<td>$4,466,202</td>
<td>$639,785</td>
<td>$5,105,987</td>
</tr>
</tbody>
</table>

The financial statements report certain categories of expenses that are attributable to program and supporting functions, which are directly charged to the functions benefited.
ELLIS AND BETTYSY COWLING
When Ellis and Bettsy Cowling first began coming to Chautauqua as young adults in the mid-1950s, an era before cell phones and instant messaging, they designated the old red wooden bridge behind the Chautauqua Amphitheater as their meeting spot. After first being introduced as students at Syracuse University, Ellis would take the bus to Chautauqua on weekends to visit Bettsy while she worked at the Athenaeum Hotel. After her shift and upon his arrival, they’d find each other on the bridge, which soon became a physical and metaphorical symbol of their shared love for each other and Chautauqua’s beautiful grounds. Throughout the following decades, they often stopped on the bridge to share a moment together.

“That was their bridge,” says Evelyn Blackley, the Cowlings’ daughter. “It was part of the fantasy for them.” And when the Amphitheater underwent renovation throughout 2016, a friend saved some wood from the bridge and fashioned it into two picture frames for the couple. “They framed some pictures of Chautauqua, which have since been passed on to me.”

While Ellis and Bettsy passed away in 2021 and 2022, respectively, their Chautauqua spirit will live on through a planned gift they made to the Chautauqua Foundation. The gift honors the deep connections they felt to the Institution, and the family and friends with whom they generously shared the experience.

“They always felt like that was the place that they could rest, gain perspective and find new things to explore,” says Evelyn. “They’d find topics of conversation that they could then take back to North Carolina and engage people with every summer.” The Cowlings owned two condos in the Longfellow, which they used to connect others to Chautauqua. “They would invite friends to come and stay in their second condo for free. They would pay for them to come just so they could experience it.”

Bettsy had been a cellist in her youth, which inspired the Cowlings to make a previous gift supporting a cello scholarship.

“My mother was a devotee of all the music programs,” says, Evelyn. “My father enjoyed them, but it was a piece of my mother’s blood, per se. Now the lectures, those were my dad’s. He was at the Hall of Philosophy every afternoon and was a member of Chautauqua Literary and Scientific Circle, but the lectures are what really moved him.”

So when the Cowlings decided to make Chautauqua the owner of a life insurance policy for which they would continually pay the premium, they opted to designate it for general Institution support.

“With the way that things have been changing over the past few years, I think that they felt unrestricted funding for all sorts of programming would allow Chautauqua to best make the decisions of how to use that funding,” says Evelyn. In this way, their gift would touch every aspect of Chautauqua they cherished, from music and lectures, to maintaining the gardens and spaces that have become special to so many other couples and families, as the red bridge was for them.

“The intellectual stimulation and the fellowship that they felt while they were there energized them for the whole remainder of the year,” says Evelyn. Though the Cowlings have passed, their legacy lives on in the memories of the family and friends who experienced Chautauqua with them, and the extraordinary generosity they created at Chautauqua.

“I’m glad that somebody will get to read about them,” says Evelyn. Because of their generous spirit, the Cowlings’ impact at Chautauqua will be felt far beyond these pages and long into the future.
ENDOWMENT FUNDS

UNSPECIFIED FUNDS
Provide general support to Chautauqua Institution

$31,365,971  Net Assets
$1,208,260  Support to the Institution

Funds invested in the ESG portfolio are indicated with a purple 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 Barley 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 Chaney Fund
Julia and William Clinger Fund
Marion and Eugene Cohen Fund
Ruth K. Collyer Endowment
Jack and Marcia Connolly Fund for Chautauqua
The Mildred K. Cooper Fund for Chautauqua
William F. and Thelma L. Cooper Endowment for Chautauqua
Helen and George L. Cornell Fund
Katharine and Robert W. Cornell Fund
Sarah A. Corns Fund
Martha S.H. Cowles Fund
Helen T. and Ralph E. Crockett Endowment
Laura and Brad Currie Endowment for Chautauqua
Elizabeth Danielson Fund
Charles and Rebecca Denton Endowment for Chautauqua
Dietrich Family Endowment at Chautauqua
Martha T. and Morgan O. Doolittle Fund
Lora Lee and Bob Duncan Endowment
Ann O. Edison Endowment
Albert C. Elser II Fund
Cordelia C. Ensign Fund
James E. Erickson Fund
Helen C. Estabrook Fund
Agnes H. and Hal A. Fausnaugh Fund
Fetterolf Family Fund
George L. Follansbee, Jr. and Gay E. Didget Endowment for Chautauqua
James L. Flynn and Shirley Mix Flynn Endowment for Chautauqua
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 Karlslake Fund
Keane Family Endowment for Chautauqua
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
Megan Kromer and Ned Lee Endowment Fund for Chautauqua
Mary E. Kuhns Fund
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
James H. Lynch, Jr. Endowment for Chautauqua
Lyndall Family Fund
Ann and Charles H. Lytle Endowment
Jeanette 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. and Charlotte B. Molyneaux Endowment
Jane C. Morgan Fund
Lewis W. & Katherine C. Morgan Fund
James R. Morris III Fund
The George E. and Susan Moran Murphy Family Fund
Orlov Family Fund for Chautauqua
Robert B. and June A. Osburn Fund
Robert Pace Endowment Fund
Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
Mary C. and William H. Park Fund
Mary Lou Cady Parlato Endowment for Chautauqua
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
ENDOWMENT FUNDS

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
Carolyn 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
Jack A. and Muriel Winter Endowment Fund
Jack R. Winter Fund
Michael Winter Fund
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
PHYSICAL MAINTENANCE FUNDS
$16,468,660 Net Assets
$660,122 Support to the Institution

Buildings and Structures
$14,188,063 Net Assets
$566,235 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 Bonnefoux-McBride Hall

SPECIFIED FUNDS
Provide support to Chautauqua Institution in accordance with the specific purpose designated by the donor
$80,647,781 Net Assets
$3,215,596 Support to the Institution

New funds are designated in orange.

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Provide support to Chautauqua Institution in accordance with the specific purpose designated by the donor
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The Dorothy J. Forney Memorial Fund
Fowler-Kellogg Art Center Endowment
The Joseph and Anna Gartner Foundation Endowment for Bonnefoux-McBride Hall

Golf Course Maintenance and Growth Fund
The Seth A. and Helen F. Goodwin Fund to Maintain the Pier Building
Kitty and Blue Greenberg Amphitheater Endowment
Thomas B. Hagen Amphitheater Endowment Fund
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
Kimberly and Robert Myers Dance Facilities Endowment
The Oliver Archives Center Endowment Fund
The I. Hale and Judy Oliver Fund for Bratton Theater
I. Hale and Judy Oliver Endowment for Connolly Residence Hall
The Rait Family Fund
The Ann Simpson Rice Youth Fund
School of Music Facilities Endowment
The Sharpe/Trefts Memorial Fund
Strohl Center Endowment
The Susan and John Turben Fund for Bratton Theater
The Sybil and Stuart Willen Fund for Bratton Theater
Youth Facilities Fund

Specific Gardens and Parks
$1,656,998 Net Assets
$68,317 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
ENDOWMENT FUNDS

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 Clara Goodmote and Robert George 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 Roy and Dorothy Wissel Garden Fund
The Frank Lloyd Wright Garden Fund
The Frank Lloyd Wright School of Architecture and Taliesin Fellowship
Garden Fund

General Grounds and Gardens
$623,599 Net Assets
$25,570 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
$15,421,604 Net Assets
$617,334 Support to the Institution

Lectureships
$10,868,378 Net Assets
$434,585 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 Baresfeld 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
Drs. Kenneth and Cheryl Gorelick Lectureship Endowment Fund
The Susan Hirt Hagen Lectures Fund
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
McCreedie 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
Emily and Richard Smucker Lectureship Fund
Marjorie and Frank Sterritte Memorial Lectureship
The Ethel Paris and Theodore Albert Viehe Lectureship
John M. Wadsworth Lectureship on Free Market and Libertarian Principles
The Dorothy M. Wissel Lectureship

Literary Arts
$1,826,686 Net Assets
$70,508 Support to the Institution
The Baird-Fuller Memorial Fund
Caroline Roberts Barnum and Julianne Barnum Follansbee Fund
Stephen and Edith Benson CLSC Endowment
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
CLSC Banner 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
Michael I. Rudell Director of the Literary Arts
W. Jeffrey Simpson Literary Arts Endowment
Smith Memorial Library Fund
Sony Ton-Aime Literary Arts Endowment

Youth Activities
$698,861 Net Assets
$28,181 Support to the Institution
Ward T. Bower Youth Activities Memorial
If you’ve picked up a copy of *The Chautauquan Daily* in the past few years, there’s a good chance that you’ve seen David Levy’s name. A professional musicologist, Ludwig van Beethoven scholar and longtime Chautauquan, David has become the go-to musical analyst for the Chautauqua Symphony Orchestra (CSO) seasonal repertoire, delivering pre-concert lectures and penning musical annotations for the *Daily*. But when he opted to create an endowment fund within the Chautauqua Foundation, he decided to put his wife, longtime CSO flutist and piccoloist Kathryn Levy, front page and center stage. “She plays with, as one colleague here in Winston-Salem puts it, ‘the purest tone in the business,’” says David. “She is so committed to orchestral playing. In all the orchestras she’s played with, she is super disciplined and diligent. Her excellence serves as a model for everybody, which I really admire.”

The Levys met at Eastman School of Music in the mid-1960s, where Kathy was studying flute and David was studying violin and music history. Their relationship flourished in the following years, taking them to Germany and Rochester. Then, in 1976, the Levys made two decisions that would change their lives forever. David accepted a position at Wake Forest University, relocating them to Winston-Salem, North Carolina, and Kathy accepted a summer position with the CSO after learning about it from then-principal flutist Bonnie Boyd. While David retired from Wake Forest in 2021, Kathy continues to play with the CSO and Winston-Salem Symphony.

The Levys found what David refers to as a “second family” in the CSO. He relishes the friendships that he and Kathy have made throughout their 47-year association with the orchestra, from golf outings and tennis matches to Sunday picnics and parties. He speaks fondly of those musicians who have passed on or moved away, leaving a lasting mark of artistic excellence. And he takes note of the new faces, not just onstage, but in the audience as well, which he sees as vital to the long-term success of both the CSO and Chautauqua Institution.

Still, despite their long involvement, the opportunity to honor Kathy came somewhat unexpectedly. When retiring, David found himself forced to take a required minimum distribution from a retirement account. After exploring ways that they could use the money, David settled on directing it to support the CSO in perpetuity, honoring both Kathy’s musical excellence and their shared love for their “second family.”

“I’m thrilled that all these aspects of my life have come together: my marriage, my involvement as a scholar and my love for Chautauqua.” He initially didn’t tell Kathy about his idea to create an endowment fund in her honor, opting instead to consult with Chautauqua staff to explore the possibilities. A regular contributor to Chautauqua’s annual fund, the prospect of supporting the CSO in perpetuity with a lump-sum gift to the Chautauqua Foundation was attractive. When he finally told Kathy about his plans, she was honored, but had one request: that the name of the fund reflect both of their names to honor their respective contributions to the CSO. Together, they settled on the Kathryn A. and David B. Levy Fund for the Chautauqua Symphony Orchestra.

“I can’t imagine Chautauqua without a symphony,” he says. Throughout their long tenure, the Levys have seen Chautauqua’s programming evolve, grow, and flourish, and the CSO along with it. He’s proud that he and Kathy will play a role in ensuring the orchestra’s longtime success. “I hope that this will leverage and inspire others to similarly support, with their dollars, something that is meaningful to them. Philanthropy is necessary to keep these institutions healthy.”

But for now, the Levys are preparing to once again inspire Chautauquans as they have for years: Kathy with her flute, and David with his pen.
ENDOWMENT FUNDS

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
$2,027,679 Net Assets
$84,060 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

PERFORMING & VISUAL ARTS FUNDS

$22,437,587 Net Assets
$901,558 Support to the Institution

General
$4,362,143 Net Assets
$180,796 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
$4,544,179 Net Assets
$188,186 Support to the Institution
A. Chace & Josephine B. Anderson Opera Endowment Fund
John E. Anderson Opera Endowment
The Peggy and Andy Anderson Family Fund for Opera
The Cynthia Auerbach Fund for Opera
Bemus Endowment for Opera
Anne and John Burden Opera Fund
Chautauqua Opera Endowment Fund
The Chautauqua Opera Guild Endowment
Thomas and Kathleen Clingan Fund for Opera
The Connolly Family Fund For Opera
The John A. and Emily McKnight Corry Opera Fund
The Barbara Baldwin DeFrees Opera Fund
The Walter F. Ferchen Opera Fund
The Eleanor B. Franks Fund for the Opera
The James and Elisabeth Groninger Fund for Opera
The Jane A. Gross Opera Endowment
The Kay Frantz Israel Fund for Opera
The Mildred Lesenger Fund for Opera
The Kay H. Logan Opera Fund
The Annette Pickens Malvin Memorial Fund for Opera
The Christopher and Susan Martin Opera Fund
The Margaret Clark Mercer Fund for Opera
The Ralph E. Miller and Paul E. Cawein Fund for Opera
The Steve Z. and Mary G. Mitchell Family Fund
The Reverend Lloyd V. Moffett Opera Endowment Fund
The Robert G. and Lillian Vitanza Ney Family Opera Fund
The Joseph A. and Anne T. Prezio Opera Endowment Fund
The Richards Family Opera Fund
The Molly Rinehart Fund for Opera
The Wadsworth Fund
Charles Weaver and Family Fund for Opera
Dr. Fred R. Whaley and Helen A. Whaley Fund for Opera
The Robert and Virginia Young Opera Fund
Zemsky Endowment For Opera

**Symphony**

**$5,141,117  Net Assets**

$209,753  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
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
Robert and Susan Laubach Endowment
The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra
Kathryn A. and David B. Levy 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
Katherine Baldridge Warman and Guy L. Warman Chautauqua Symphony Orchestra Fund
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**

**$1,620,291  Net Assets**

$66,080  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
Irene and David Tabish Endowment for Theater

**Dance**

**$1,678,433  Net Assets**

$65,157  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
Craig and Cathrine Greene Family Fund
Terrie Vaile Hauck Dance Endowment
Moore Fund for Dance
ENDOWMENT FUNDS

Visual Arts
$2,788,101 Net Assets
$109,936 Support to the Institution
Je'Anne Griffin Bargar Endowment for Visual Arts
The Chautauqua Art Association, Inc. Visual Arts Fund
Shirley Mix Flynn Visual Arts Endowment
Chip and Gail Gamble Visual Arts Endowment
Joan and David Lincoln Ceramics Endowment
Florence H. Norton and Cynthia Norton Visual Arts Endowment
Leon and Gloria Plevin Family Museum Director Lecture Fund
Sydelle Sonkin and Herb Siegel Artistic Director of the Visual Arts
Susan and John Turben Director of the VACI Galleries Endowment

OTHER
$2,303,323 Net Assets
$81,650 Support to the Institution
Shirley A. and Arthur R. Duffy Endowment for Classical Guitar
Kay Hardesty Logan Fund
Heintzelman Family Piano Fund
Anne Capper McIntosh and Walter Stevenson McIntosh Endowment for Voice

RELIGION FUNDS
$7,514,811 Net Assets
$307,756 Support to the Institution

General
$1,817,297 Net Assets
$73,295 Support to the Institution
Campbell Department of Religion Fund
The Richard W. and Dorothy B. Comfort Religious Initiatives Fund
Eleanor B. Daugherty Fund
Department of Religion Fund
Department of Religion Leadership Fund
The John and Christine Dawson Family 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
$1,155,273 Net Assets
$47,883 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
$1,803,693 Net Assets
$74,773 Support to the Institution
Glenn R. Bucher Memorial Lectureship
Carnahan-Jackson Religious Lectureship
The Jack and Elizabeth Gellman and Zaretsky Family Fund
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When Jeannette Kahlenberg first read about Chautauqua Institution in a newsletter for Presbyterian ministers, she didn’t imagine that the experience would have a profound and continuing effect on her family.

“I was kind of intellectually starved at that point with three little kids at home,” she remembers, “so the idea of being able to go to lectures and have the children attend Children’s School was wonderful.”

Though her late husband Richard, a minister, came to Chautauqua as a child and cherished the experience, Jeannette first grew interested when she learned about the weeklong rooming opportunities for families provided by the Presbyterian Association of Chautauqua. During the first week they attended together in 1964, Chautauqua provided the entire Kahlenberg family with educational offerings that helped them expand their intellectual horizons and has since allowed her children and grandchildren to progress into new experiences as they’ve grown older.

The Kahlenbergs’ 1883 Victorian cottage on Scott Avenue is the summer hub for their family, which now spans four generations. Though the home’s five bedrooms once comfortably accommodated the entire family, the many grandchildren and great-grandchildren now exceed the available space, so they coordinate their visits throughout the summer. Jeannette’s children try to return each summer to attend the morning lecture that is supported by their family’s Chautauqua Foundation endowment fund.

Chautauqua has been a shared experience for the family, which has extended to their philanthropic support as well. While each of the Kahlenbergs have their own favorite offerings at Chautauqua, they opted to direct their family’s support to the Chautauqua Lecture Series, for which they have a uniform passion.

Established by the Kahlenbergs in 2012 to honor Richard, who passed away in 2004, the Richard W. and Jeannette D. Kahlenberg Lectureship Fund has provided support for lecturers including David Brooks, Eric Larson, and Linda Greenhouse. The opportunities to meet lecturers are special bonding experiences for many donor families, including the Kahlenbergs.

“Eric Larson was an interesting experience because several of our older family members were prepared to ask him specific questions about his book, which they all read, but he immediately zeroed in on the grandchildren,” says Jeannette. “He asked them about their college majors or the careers that they had just started. He really focused on the younger generation. It was so intriguing.”

Whether it be the Chautauqua Lecture Series, religious programming or the arts, Jeannette says that she encourages other philanthropically minded families to, “make a contribution to something that you think is important.” For her part, Jeannette hopes that her family’s lectureship will continue to support the intellectual stimulation that was so refreshing to her when she first stepped onto the grounds nearly 60 years ago.

“I hope it will encourage Chautauqua to reach out to more and more diverse speakers who have something to challenge our thinking. It’s just important that all of us keep growing. That’s the exciting thing about Chautauqua lectures. There are constant challenges to our thinking so that we don’t get into a rut. In this era, when we are so politically divided, to whatever extent we can understand different points of view, I think that’s very important.”
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James H. Lynch, Jr.
Mrs. Charles H. Lytle
Anna Mary and Richard M. Maddy
• Holly Mak and Marc Hersh
Ms. Cordelia S. May
Miss Mary E. McCarn
Dr. and Mrs. Frank E. McElree, Jr.
Bruce W. and Sarah Hagen McWilliams
W. Richard and Mary Lu Mertz
Edward and Lynn Metzger
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Thomas Moore
Mr. and Mrs. James Reed Morris, IV Family
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Richard M. Murray
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Sanford and Margery Nobel
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Hale and Judy Oliver
Robert A. Ott, Jr.
Mr. and Mrs. William H. Park
Mary Lou and Richard Parlato
Dorothy M. Payne
Deloras Pemberton
Miss Margaret A. Penn
Prue C. and William M. Petre
Leon and Gloria Plevin Family Foundation
Richard A. and Esther M. Popp
Av and Janet Posner
Mrs. Lois Raynow
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The Reinberger Foundation
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Mr. and Mrs. Bartlett Richards, III
Molly F. Rinehart and Charles L. Christian
Pat and Bill Rittman
Drs. Larry and Carol Rizzolo
Jerrie Hawkins Roba
Joseph H. and Florence E. Roblee Foundation
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John and Takako Sachse
Kimberly Sachse and Joseph Grimes
Jane and Walter C. Shaw, Jr.
Mr. Donald Chace Shaw
Mr. and Mrs. Ralph C. Sheldon, Jr.
• Frank D. Skinner
The Carter Smith Family
Andrew and Donna Sorensen
Southern Chautauqua County Retired Teachers Association
Lydia Strohl and Eric Riddleberger
Mr. and Mrs. Robert C. Switzer
Susan and John Turben
Foundation
Nancy and Peter Waasdorp
Charles and Lois Weaver
Edris and David H. Weis
Drs. Donald West and Mary Elizabeth King
• Katherine Karslake White
Stuart and Sybil Willen
Mary Louise Williamson
Susan O. Wood
John B. Yoder
Shirley and Sam Zemsky
Steve Zenczak and Pat Feighan

$50,000–$99,999
Anonymous (4)
Applequist Family Charitable Fund
The Children of Julia Gibson Axtell
Mr. and Mrs. James M. Bailey
Mr. and Mrs. Kenneth L. Barley
Constance Barton and William Northrop
William E. and LaDonna G. Bates and Family
Jo Bell
William and Christina Bemus
Mrs. Cora M. Blair
Mary Boyle and Ted Arnn
Sara E. Bradley
Nancy E. Brewer
Christine and Jason Brueschke
Katharine J. Carnahan
Mary Peterson Chalfant
Chautauqua Bird, Tree and Garden Club
Carl Chaverin
Jean Cheney
T. James and Hazel Clarke
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Mr. and Mrs. Thomas O. Clingan
Mr. and Mrs. Eugene S. Cohen
Wendell and Ruth Gerrard Cole
• Miriam L. Coleman
Ruth Collyer
Richard and Dorothy Comfort
Martha S.H. Cowles
The Marty and Sandy Coyle Family Fund of the Ayco Charitable Foundation
Jim and Karen Dakin
Christine and John Dawson
Dorothy L. Downing
Carol McCarthy Duhme
Miss Helen C. Estabrook
Falk Foundation
Sylvia M. Faust
Ted and Deborah First
Mr. and Mrs. James L. Flynn
Dorothy Forney
Jane Fortune
Fradin Silberstein Foundation
S. Allen Goodwin
Bluie and Kitty Greenberg
Fred and Judy Gregory
Thomas L. Hagner and Linda A. Ulrich-Hagner
Mrs. E. Snell Hall
• Murray and Pegi Hamner
Kathleen E. Hancock
Sarah R. Hankey
Terrie Vaile Hauck
Marsha L. Haug
Pamela and Bradley Hemminger
Esther M. Huntoon
IBM Matching Grants Program
Dr. and Mrs. Paul Irion
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Richard L. and Lisa S. Jackson
Mr. and Mrs. Robert Jacobs
Mr. and Mrs. Donald D. Jansen
Catherine (Kitty) Jarjisian
Melvin H. and Karin A. Johnson
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Mr. and Mrs. Max R. Kahn
Mr. and Mrs. Dale E. Kaufman
Christopher Keyser and Susan Sprung
Subagh Khalsa and Linda Winkelstern
Judy and Jim Kullberg
Arthur C. LeVan, Sr.
Jim & Lynn Levinson Fund of the Erie Community Foundation
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Dale and Mary Lyndall
Flora and Ross Mackenzie
Mr. and Mrs. Dayton Mak
Mr. Gerald and Rev. Dorothea Maloney
Candace and Scott Maxwell
Samuel R. and Ann J. McClure
Anne C. McIntosh
Robert and Carol McKiernan
Everett and Sarah Holden McLaren
Mrs. Helen Cooper Mercer
Margaret C. Mercer
Dr. and Mrs. David L. Miller
R. James Miller and C.L. Schelhas-Miller
Richard H. Miller, Jr.
Mrs. Walter L. Miller
Dr. Steve and Mary Gibbs Mitchell
Helen Vallance Moe
Mary Anne and John Morefield
Mrs. W.A. Morrison
Cynthia Adamson Murray
Mrs. Kathryn K. Musgrove
Mr. and Mrs. Joseph A. Neubauer
Drs. 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
Les Reynolds and Diane Payne Reynolds
Mark and Ann Ayers Ritacco
Mrs. Mary D. Ritts
Doris H. Ruslink
Jone and Bill Schlackman
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Mrs. Gertrude Elser Schroeder
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Dr. and Mrs. William Blake Selnick
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Steel Hector and Davis
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Mrs. Nina T. Wensley
Helen M. White
Mr. and Mrs. Roy A. Wissel
Shirley M. Woolaway

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Leon W. Archer
Rita Argen Auerbach
Sherra and James Babcock
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Miss Julia M. Bates
Tom and Jane Becker
Gordon B. Benn
Mr. and Mrs. Alan J. Blair
Susan and Fran Bonsignore
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Toni and Paul Branch
David and Sharon Britton
The Kate and Isaac Brody Foundation
Patricia M. and Ernest G. Brown
Byham Charitable Foundation
Gloria Caldwell
Jacqueline and Selden Campen
The Caplice Family Charitable Fund
Mrs. Barbara P. Chadwick
Chautauqua Golf Club Project/Board of Governors
Judith S. Claire and Robert W. Van Every
Cynthia Clarke
Roger and Suzy Conner
Barbara and James Copeland
Sarah A. Corns
Elizabeth Danielson
Louise Shaw Dill
Mr. and Mrs. Morgan O. Doolittle
Rita A. Dunn
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Mr. and Mrs. C. Fred Fetterolf
Jennifer J. and Richard J. Flanagan
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Robert F. Forbes
Dr. and Mrs. Herbert P. Fritz
Dennis J. Galucki
Dr. Marc Geller
Carole E. Gladstone
Mr. and Mrs. Alfred Goldman
Patricia Goldman and Stephen Kurzman
Suzanne C. Gray
Errol and Oakley Green
Don and Kathleen Greenhouse
Kent I. and Fredrika S. Groff
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James P. and Barbara Heinz Hancock
Sam and Diana Harbison
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Anita and Sidney Holec
Mr. and Mrs. Cyril T. M. Hough
George and Constance Howard
Evelyn G. Howard
Boynton and Diane Hussey
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Sally L. Wissel
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Dr. Michael L. Barnett
Robert and Joan Battaglin
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Alice Ward Benedict
The Glenn P. Benjamin
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Jim and Kim Biskup
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Frances Black
David R. and Margaret Blossom
Don and Bea Blumenthal
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The Braitmayer Foundation
Wanita Bratton
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
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Karen and David Davenport
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Oppmann
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Todd Holland and Scotch Ellis
Loring
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Hubbard, Jr.
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Luisa Hunnewell and Larry
Newman
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The Ruth H. Jackson Charitable
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Barbara and Joel Jacob
Stephen Jacobs and Patricia
Curley
David and Fern Jaffe
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Mary Hillman Jennings
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Jeffrey S. Johnson
Jeremy Johnson
Bob and Selina Johnson
Miss Doris Goodrich Jones
Dyeann and Henry Jordan
Imam Feisal Abdul Rauf and
Daisy Khan
Patricia Kaighin
Norman and Nancy Karp
Mr. and Mrs. William G. Karlake
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Kyle and Elizabeth Keogh
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Patricia L. King
The Jennifer and Tim Kingston
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Sharon McKee
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Lindy McKnight and Erin
Cunningham
J.J. Medveckis Foundation
Edward and Betsy Merchant
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Arlington Community
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Elizabeth Miller Trust
Ian and Liz Miller Charitable
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The Newman’s Own Fund
Dr. Lillian Vitanza Ney
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M.L.E. Foundation, Inc.
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Nancy Okstein
Melissa Orlov
Dolores F. Parlato
James S. Patton
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TO ENDOWMENT
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Mike and Judy Patton
Rita E. Paul
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David R. and Cynthia V. Pelton
Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
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Hollister Reid and A. Quentin Orza, II
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Sherry Reid
Agnes H. Reigart
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The Rockefeller Foundation
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Evangeline McKnight Speer
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Florence Mina Miller Weiler
Drs. Jennifer and Robert Weisenthal
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Mrs. E.J. Bellinger • August 1937 to October 1963
Mrs. L. D. Boal • August 1937 to August 1955
Samuel M. Hazlett • August 1937 to July 1956
James H. Matthews • August 1937 to 1939
Walter Roberts • August 1937 to March 1959
David L. Starr • August 1937 to 1951
Mrs. Livingston Hunter • August 1939 to 1942
Mrs. Dorothy Smith • August 1943 to 1950
Walter F. Rittman • August 1950 to September 1954
Harold F. Reed • August 1951 to August 1971
Mrs. Walter F. Rittman • August 1955 to January 1964
Paul N. Anderson • August 1955 to August 1965
Walter C. Shaw, Jr. • August 1956 to August 1974
John D. Hamilton • July 1959 to August 1971
Samuel P. Price, Sr. • August 1962 to August 1995
Mrs. Dorothy W. Cook • August 1964 to August 1987
Lewis W. Morgan • August 1964 to August 1990
Nancy Miller Arnn • August 1965 to August 1989
Richard H. Miller • August 1971 to August 1996
J. Donald Patton • August 1971 to August 1984
Howard G. Gibbs • August 1974 to August 1990
Oscar E. Remick • September 1975 to December 1976
Robert S. Bargar • August 1976 to August 1994
Mrs. Mary B. McDowell • August 1976 to August 1982
John S. Rogers • August 1976 to August 1986

David H. Carnahan • August 1976 to January 2000
George L. Cornell • August 1976 to August 2001
Joseph A. Neubauer • August 1977 to November 1983
Robert R. Hesse • January 1978 to November 1983
Richard L. Bechtolt • August 1982 to July 2006
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Edward P. Boyle • August 1984 to August 1994
Frank E. McElree, Jr. • August 1984 to August 1996
H. David Faust • August 1986 to June 1988
Mary Frances Cram • August 1987 to August 1993
Robert B. Osburn • August 1989 to August 1996
Harold F. Reed, Jr. • August 1989 to August 2001
Eugene S. Cohen • August 1990 to August 1998
George L. Follansbee, Jr. • August 1990 to March 2004
Hal A. Fausnaugh • April 1990 to August 1994
R. Quintus Anderson • April 1991 to August 1995
William F. Hill, II • April 1991 to August 2005
Patricia Goldman • August 1992 to August 2003
Marilyn G. Levinson • August 1992 to August 2000
William H. Park • August 1993 to August 2005
William R. Goodell • August 1994 to August 2019
James G. Groninger • August 1994 to August 2014
William G. Karslake • August 1994 to August 1995
Thomas R. Bromeley • August 1995 to June 2001
vic gelb • August 1995 to August 2011
Selina P. Johnson • August 1996 to August 2008
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Walter Roberts • August 1937 to August 1957
Harold F. Reed • August 1957 to August 1967

John D. Hamilton • August 1967 to August 1971
Richard H. Miller • August 1971 to August 1996

William F. Hill, II • August 1996 to August 2002
Lowell K. Strohl • August 2002 to August 2008

Steven W. Percy • August 2007 to August 2015
Cathy L. Bonner • August 2015 to August 2019

Wilfred R. Konneker • January 1996 to August 2006
Lowell K. Strohl • August 1996 to February 2010
Miriam S. Reading • January 1997 to August 2006
Susan Moran Murphy • August 1998 to August 2018
Martin Coyle • August 2000 to November 2003
Wendy Cohen • August 2001 to May 2011
Scott McVay • January 2001 to December 2003
Allen Short • August 2001 to August 2005
Karen Goodell • August 2001 to August 2021
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 Haughton • August 2017 to November 2022
John S. Kobacker • August 2011 to September 2016
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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
OFFICERS, DIRECTORS AND STAFF

Directors

<table>
<thead>
<tr>
<th>Name</th>
<th>Term Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brett Altman of Wyndmoor, Pennsylvania</td>
<td>2026</td>
</tr>
<tr>
<td>David W. Anderson of Hingham, Massachusetts</td>
<td>2023</td>
</tr>
<tr>
<td>Stacey Berger of New Orleans, Louisiana</td>
<td>2025</td>
</tr>
<tr>
<td>Susan Bosland of Alexandria, Virginia</td>
<td>2023</td>
</tr>
<tr>
<td>Andrew L. Camden of Grosse Pointe, Michigan</td>
<td>2025</td>
</tr>
<tr>
<td>Erroll B. Davis Jr. of Atlanta, GA</td>
<td>2024</td>
</tr>
<tr>
<td>Charles Denton of Brookhaven, GA</td>
<td>2024</td>
</tr>
<tr>
<td>Charles S. Gamble of Dunedin, Florida</td>
<td>2024</td>
</tr>
<tr>
<td>Michael E. Hill of Washington, D.C. and Chautauqua, New York - ex officio</td>
<td>2024</td>
</tr>
<tr>
<td>Nancy Kyler of Staunton, VA</td>
<td>2024</td>
</tr>
<tr>
<td>Betsy Bechtolt-Magley of Pittsburgh, PA</td>
<td>2025</td>
</tr>
<tr>
<td>Craig Marthinsen of Toronto, Ontario</td>
<td>2026</td>
</tr>
<tr>
<td>Anne Odland of Washington, D.C.</td>
<td>2026</td>
</tr>
<tr>
<td>Richard Osborne of Charlotte, North Carolina</td>
<td>2023</td>
</tr>
<tr>
<td>M. Timothy Renjilian of Atlanta, Georgia</td>
<td>2023</td>
</tr>
<tr>
<td>Anne Hoyt Scavone of New York, New York</td>
<td>2026</td>
</tr>
<tr>
<td>Sheila Schroeder of London, England</td>
<td>2025</td>
</tr>
<tr>
<td>George T. Snyder of Pittsburgh, Pennsylvania</td>
<td>2025</td>
</tr>
<tr>
<td>Stephen J. Zenczak of Washington, D.C.</td>
<td>2023</td>
</tr>
</tbody>
</table>

Term Expires:

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

Officers

- M. Timothy Renjilian • Chair
- Craig Marthinsen • Vice Chair
- Sheila Schroeder • Treasurer
- Deborah E. Moore, CPA • Executive Director
- Kimberly Rowe • Corporate Secretary

Staff

- Deborah E. Moore, CPA • Executive Director
- Jennifer L. Burgeson • Fund Accountant
- Kimberly Rowe • Corporate Secretary and Executive Assistant

i Coincides with term on the Chautauqua Institution’s Board of Trustees
ii Coincides with term as President of Chautauqua Institution