



## 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.



## MESSAGE FROM LEADERSHIP



M. Timothy Renjilian Chair, Board of Directors



Deborah E. Moore, CPA Executive Director

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.

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Sincerely,

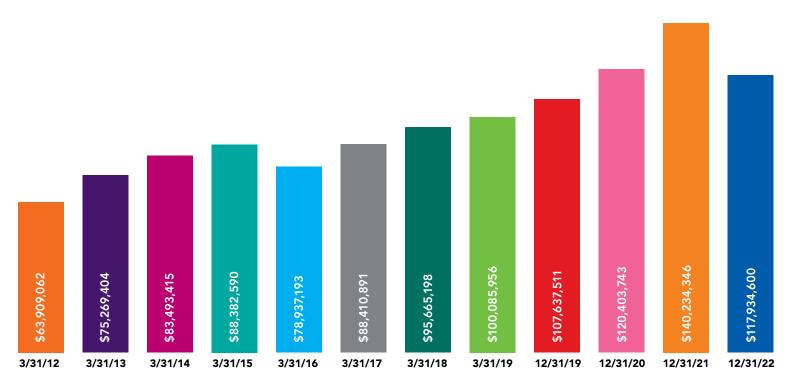
## FINANCIAL REPORT

### **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**

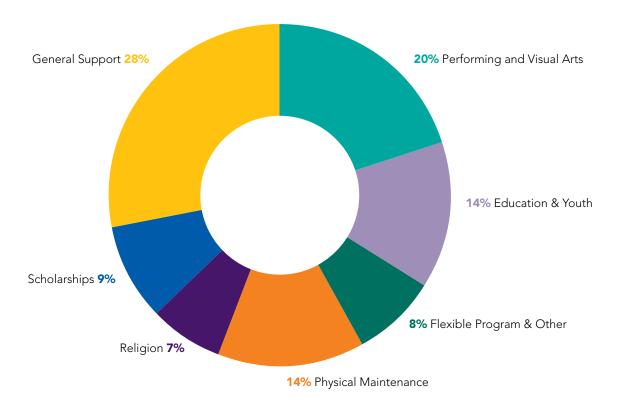
Total net assets of the Foundation are comprised of gifts already received and the net appreciation of those gifts, as well as the net discounted value of certain commitments. The net assets of the Foundation have increased by \$54 million from \$64 million as of March 31, 2012 to \$118 million as of 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**

**743**3/31/19

**765** 

775

**788** 

**794** 

## FINANCIAL REPORT

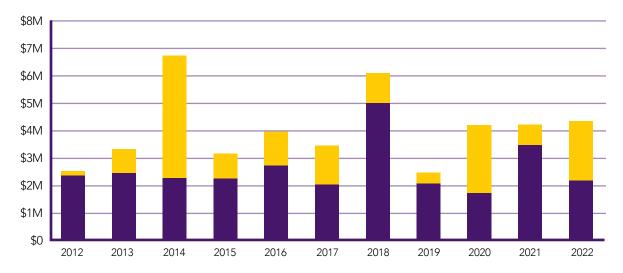
## **Endowment Fundraising Objectives**

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.

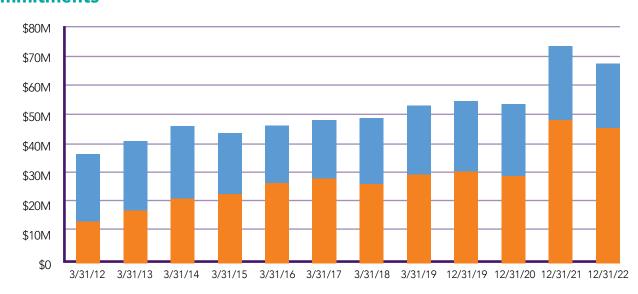
 Realized Planned Gifts
 Pledge Payments and Outright Gifts Received



### **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.

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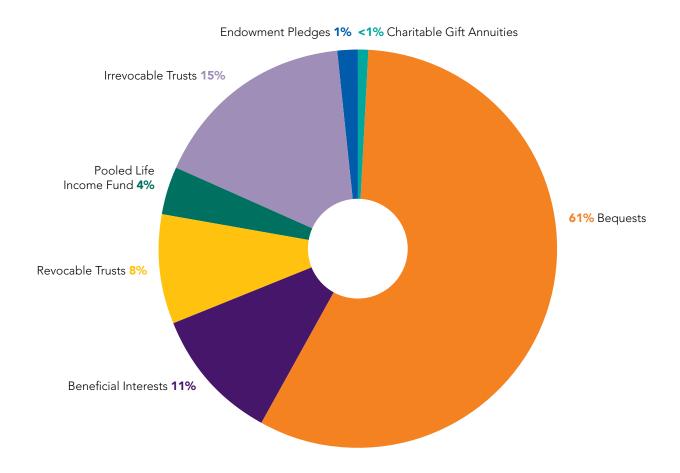


### **Future Commitments to Endowment**

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.



## FINANCIAL REPORT

## **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.

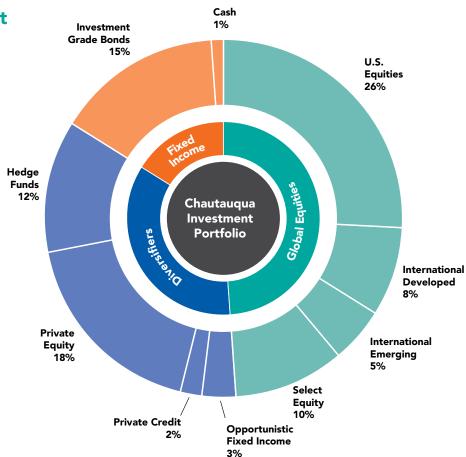
Hirtle Callaghan & Co., LLC serves as the Foundation's Outsourced Chief Investment Officer and actively manages the majority of the endowment portfolio, two portfolios comprised of other restricted funds, and the Environmental, Social and Governance (ESG) investment portfolio.

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.

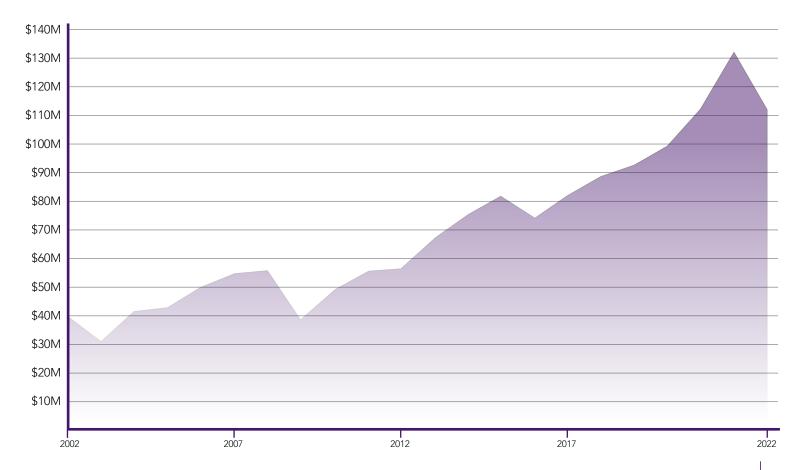


## **Investment Management**

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.



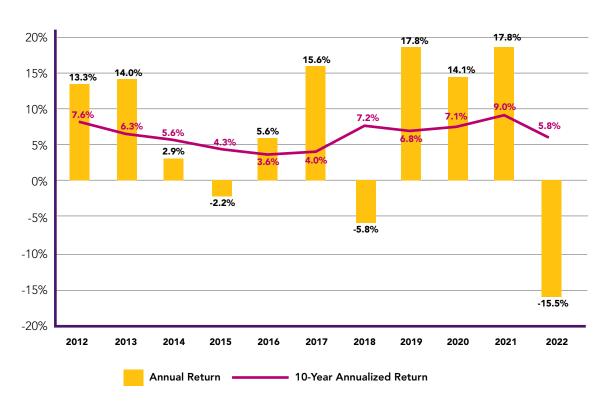
## FINANCIAL REPORT

### **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.

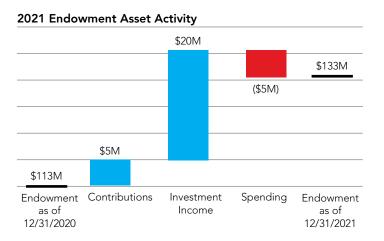
#### 10-Year Annualized Returns

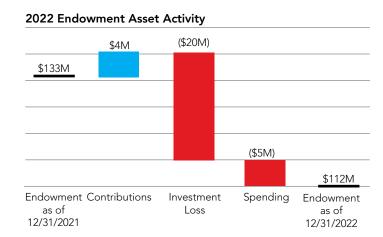
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
10-Year Return	7.6%	6.3%	5.6%	4.3%	3.6%	4.0%	7.2%	6.8%	7.1%	9.0%	5.8%
Benchmark	6.7%	5.9%	4.9%	4.0%	3.0%	3.7%	6.7%	6.5%	6.7%	8.2%	5.4%



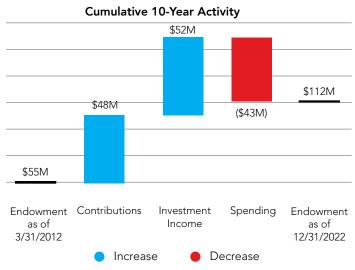
## **Financial Objective of Endowment Investment Program**

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.





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.



## REPORT OF INDEPENDENT AUDITORS

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

Lymelon & Melornick, see

## STATEMENTS OF FINANCIAL POSITION

December 31,	2022	2021
Assets:		
Cash	\$ 468,951	\$ 1,250,851
Contributions receivable (Note 2)	554,319	941,680
Investments (Note 3)	113,209,818	133,861,941
Split-interest agreements	4,306,883	5,236,353
Other assets	582,725	425,519
	\$ 119,122,696	\$ 141,716,344
Liabilities and Net Assets:		
Liabilities:		
Payable to the Institution (Note 4)	\$ 1,133,249	\$ 1,428,028
Accounts payable and accrued expenses	54,847	53,970
	1,188,096	1,481,998
Net Assets (Note 5):		
Without donor restrictions	6,358,897	6,885,646
With donor restrictions	 111,575,703	133,348,700
	117,934,600	140,234,346
	\$ 119,122,696	\$ 141,716,344



## STATEMENTS OF **ACTIVITIES**

## For the year ended December 31, 2022

	 Without Donor Restrictions	With Donor Restrictions	Total
Revenues:			
Contributions:			
Endowment	\$ 751,734	\$ 3,630,602	\$ 4,382,336
Other	-	69,683	69,683
Change in value of			
split-interest agreements	-	(934,470)	(934,470)
Investment income (loss)	(1,042,411)	(19,594,799)	(20,637,210)
Total revenues	(290,677)	(16,828,984)	(17,119,661)
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)	(21,772,997)	(22,299,746)
Net assets - beginning	 6,885,646	133,348,700	140,234,346
Net assets - ending	\$ 6,358,897	\$ 111,575,703	\$ 117,934,600
	 <del></del>		

## For the year ended December 31, 2021

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

## STATEMENTS OF CASH FLOWS

For the years ended December 31,		2022	2021		
Operating activities:					
Change in net assets	\$	(22,299,746)	\$	19,830,603	
Adjustments to reconcile change in net assets					
to net cash flows from operating activities:					
Net realized and unrealized (gains) losses		21,334,411		(19,390,892)	
Changes in other operating assets and liabilities:					
Contributions receivable		387,361		1,328,661	
Receivable from split-interest agreements		929,470		(1,093,025)	
Other assets		(157,206)		153,281	
Payable to the Institution		(294,779)		226,116	
Accounts payable and accrued expenses		877		3,754	
Net operating activities		(99,612)		1,058,498	
Investing activities:					
Purchases of investments		(14,653,253)		(18,403,389)	
Proceeds from sales of investments		13,970,965		17,396,312	
Net investing activities		(682,288)		(1,007,077)	
Net change in cash	-	(781,900)		51,421	
Cash - beginning		1,250,851		1,199,430	
Cash - ending	\$	\$468,951	\$	1,250,851	

## NOTES TO FINANCIAL STATEMENTS

#### 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.

## NOTES TO FINANCIAL STATEMENTS

#### 2. Contributions Receivable:

	2022	2021
Gross unconditional promises to give	\$ 559,336	\$ 954,740
Less unamortized discount	5,017	13,060
	\$ 554,319	\$ 941,680

Contributions receivable at December 31, 2022 are expected to be received over the periods shown below:

Less than one year	\$ 516,938
One to five years	42,398
	\$ 559,336

#### 3. Investments:

2022		uoted Prices in Active Markets	Net Asset Value	Total
Money market	\$	869,606	\$ _	\$ 869,606
Equities		43,491,672	-	43,491,672
Fixed income		20,587,105	-	20,587,105
Hedge fund		-	14,379,312	14,379,312
Private equity/cre	edit	-	22,275,667	22,275,667
Select equity		-	11,606,456	11,606,456
	\$	64,948,383	\$ 48,261,435	\$ 113,209,818

#### 2021

2021				
Money market	\$	1,033,962	\$ -	\$ 1,033,962
Equities		53,073,948	-	53,073,948
Fixed income		20,582,237	-	20,582,237
Hedge fund		-	21,206,070	21,206,070
Private equity/cr	edit	-	23,362,159	23,362,159
Select equity		-	14,603,565	14,603,565
	\$	74,690,147	\$ 59,171,794	\$ 133,861,941

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

	 ithout Donor	With Donor	<b>+</b>
2022	Restrictions	Restrictions	Total
Dividends and interest, net Net realized and	\$ 54,602	\$ 642,599	\$ 697,201
unrealized losses	(1,097,013)	(20,237,398)	(21,334,411)
	\$ (1,042,411)	\$ (19,594,799)	\$ (20,637,210)
2021			
Dividends and interest, net Net realized and	\$ 59,769	\$ 947,298	\$ 1,007,067
unrealized gains	830,169	18,560,723	19,390,892
	\$ 889,938	\$ 19,508,021	\$ 20,397,959

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	2021
Redemption frequency:		
Daily	\$ 64,948,383 \$	74,690,147
Quarterly	11,606,456	11,603,565
Semi-annually	14,379,312	21,206,070
Quarterly after initial		
lock-up period	-	3,000,000
Nonredeemable	22,275,667	23,362,159
	\$ 113,209,818 \$	133,861,941

#### 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:

	2022	2021
Endowment direct support	\$ 1,099,296	\$ 1,399,275
Other	33,953	28,753
	\$ 1,133,249	\$ 1,428,028

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:

Board-designated endowments
Unrestricted gifts

2022	2021
\$ 5,426,178 932,719	\$ 5,860,050 1,025,596
\$ 6,358,897	\$ 6,885,646

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

2022

2021

2021

	2022	2021
Gains - specified endowments	\$ 13,238,434	\$ 31,499,707
Gains - unspecified endowments	3,523,898	9,318,108
Board-designated endowments	466,383	552,361
Other restricted gifts	349,558	291,550
	\$ 17,578,273	\$ 41,661,726

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:

	2022	2021	
Specified endowments Unspecified endowments	\$ 69,677,551 24,319,879	\$	67,191,014 24,495,960
	\$ 93,997,430	\$	91,686,974

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.

## NOTES TO FINANCIAL STATEMENTS

#### 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:

	Without Donor Restrictions Board- Designated		With Donor Restrictions				
2022			Board- Designated		Perpetual Endowment		Total
Endowment assets – beginning of year Investment loss Contributions Other adjustments Appropriated Endowment assets – end of year	\$	5,860,050 (955,643) 765,144 (13,410) (229,963) 5,426,178	\$ \$	552,361 (87,357) 10,000 13,410 (22,031) 466,383	\$	126,337,268 (19,511,559) 3,626,695 362,268 (4,906,192) 105,908,480	\$ 132,749,679 (20,554,559) 4,401,839 362,268 (5,158,186) 111,801,041
2021							
Endowment assets – beginning of year Investment income Contributions Other adjustments Appropriated	\$	4,935,482 902,188 240,880 5,350 (223,850)	\$	486,848 87,594 - (22,081)	\$	107,225,075 19,422,439 4,525,443 (12,061) (4,823,628)	\$ 112,647,405 20,412,221 4,766,323 (6,711) (5,069,559)
Endowment assets – end of year	\$	5,860,050	\$	552,361	\$	126,337,268	\$ 132,749,679

## NOTES TO FINANCIAL STATEMENTS

### 9. Expenses by Nature and Function:

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

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 BETTSY 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 Chautaugua

Bemus Fund for Chautaugua

Gordon Benn Fund

Alan J. and Mary Hough Blair Fund

The Erika Block Fund for Chautaugua

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 Chautaugua

Elizabeth Danielson Fund

Charles and Rebecca Denton Endowment for Chautauqua

Dietrich Family Endowment at Chautaugua

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 Chautaugua

Joanne Babcock Fuller Endowment

Gelb Family Endowment for Chautauqua

William R. and Betsy Callicott Goodell Endowment

Kathleen M. and Donald C. Greenhouse Endowment for Chautaugua

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 Chautaugua

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 Chautaugua

Charles R. Hunter, Jr. Fund Esther M. Huntoon Fund

Verna Jackson Memorial Endowment for Chautaugua

James Family Fund

Donald D. Jansen Endowment for Chautauqua

Katherine King Karslake 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 Chautaugua

Konneker Fund

• Megan Kromer and Ned Lee Endowment Fund for Chautaugua

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

Jeannette B. Mainwood Fund

Gerald and Dorothea Maloney Endowment

Clara Masik Endowment

Lillian W. Masters Endowment for Chautauqua

Candace and Scott Maxwell Fund

Mary E. McCarn Fund

Mary Jane and Donald McClurg Endowment

Margaret C. Mercer Endowment

Richard H. Miller Fund

Dawson E. 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 Chautaugua

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 Chautaugua

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 Chautaugua

## **ENDOWMENT FUNDS**

Bert W. and Joanne R. Simons Endowment

Elizabeth M. Smith Memorial Endowment for Chautaugua

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 Chautaugua

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

### **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.

# 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

Chautaugua 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

Golf Course Maintenance and Growth Fund

The Seth A. and Helen F. Goodwin Fund to Maintain the Pier Building

Kitty and Bluie 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

Arline 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 Barensfeld 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 "Chautaugua Impressions" Fund

Carnahan-Jackson Lectureship

Chautaugua 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

McCredie Family Fund

National Endowment for the Humanities Fund

Joseph A. Neubauer Lectureship in Science

Margaret Miller Newman Lectureship Fund

Kathryn Sisson Phillips Memorial Lectureship Fund

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

Chautaugua 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

# DAVID & KATHRYN LEVY



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 Chautaugua 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**

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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

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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

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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

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John E. Anderson Opera Endowment

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The Cynthia Auerbach Fund for Opera

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Anne and John Burden Opera Fund

Chautauqua Opera Endowment Fund

The Chautauqua Opera Guild Endowment

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The Connolly Family Fund For Opera

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The Barbara Baldwin DeFrees Opera Fund

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Terrie Vaile Hauck Theater Endowment

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## JEANNETTE KAHLENBERG

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."

## **ENDOWMENT FUNDS**

### FLEXIBLE PROGRAM FUNDS

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David H. Carnahan • August 1976 to January 2000 George L. Cornell • August 1976 to August 2001 Joseph A. Neubauer • August 1977 to November 1983 Robert R. Hesse • January 1978 to November 1983 Richard L. Bechtolt • August 1982 to July 2006 Daniel L. Bratton • August 1984 to December 2000 Edward P. Boyle • August 1984 to August 1994 Frank E. McElree, Jr. • August 1984 to August 1996 H. David Faust • August 1986 to June 1988 Mary Frances Cram • August 1987 to August 1993 Robert B. Osburn • August 1989 to August 1996 Harold F. Reed, Jr. • August 1989 to August 2001 Eugene S. Cohen • August 1990 to August 1998 George L. Follansbee, Jr. • August 1990 to March 2004 Hal A. Fausnaugh • April 1990 to August 1994 R. Quintus Anderson • April 1991 to August 1995 William F. Hill, II • April 1991 to August 2005 Patricia Goldman • August 1992 to August 2003 Marilyn G. Levinson • August 1992 to August 2000 William H. Park • August 1993 to August 2005 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

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 Laura P. Currie • June 2012 to August 2017 Cathy L. Bonner • August 2013 to August 2019 William James • August 2013 to August 2020 P. James Brady • August 2015 to August 2016 Georgia M. Court • August 2016 to October 2017 John A. Milos • August 2016 to August 2019 Richard Wade • August 2016 to August 2020

#### Former Board Leadership

Walter Roberts August 1937 to August 1957

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 2008 to August 2015

Cathy L. Bonner August 2015 to August 2019

## OFFICERS, DIRECTORS AND STAFF

Directors	Term Expires
Brett Altman of Wyndmoor, Pennsylvania • 1, 4	2026
David W. Anderson of Hingham, Massachusetts • 2, 3, 5,	, 6 2023
Chair, Nominating & Governance Committee	
Stacey Berger of New Orleans, Louisiana • 2, 5	2025
Susan Bosland of Alexandria, Virginia • 6, 7	2023
Andrew L. Camden of Grosse Pointe, Michigan • 3, 5, 6	2025
Chair, Investment Committee	
Erroll B. Davis Jr. of Atlanta, GA • 5, 8	2024
Charles Denton of Brookhaven, GA • 1, 6	2024
Charles S. Gamble of Dunedin, Florida • 4, 5, 8	2024
Michael E. Hill of Washington, D.C. and	ii
Chautauqua, New York - ex officio • 3, 4, 5	
Nancy Kyler of Staunton, VA • 1, 2, 7	2024 <sup>i</sup>
Betsy Bechtolt-Magley of Pittsburgh, PA • 2, 7	2024
Craig Marthinsen of Toronto, Ontario • 3, 4, 5	2026
Anne Odland of Washington, D.C. • 1, 3, 4	2026
Chair, Audit Committee	
Richard Osborne of Charlotte, North Carolina • 2, 4	2023 <sup>i</sup>
M. Timothy Renjilian of Atlanta, Georgia • 1, 2, 3, 4, 5, 6,	7, 8 2023
Chair, Executive Committee	
Chair, Board of Directors	
Anne Hoyt Scavone of New York, New York • 3, 6, 7	2026
Chair, Personnel Committee	
Sheila Schroeder of London, England • 3, 4, 5, 8	2025
Chair, Finance Committee	
Chair, Strategy Committee	
George T. Snyder of Pittsburgh, Pennsylvania • 1, 3, 7, 8	3 2025
Stephen J. Zenczak of Washington, D.C. • 1, 4	2023
1 - Audit Committee 2 - Development Council 3 - Executive Committee 4 - Finance Committee 5 - Investment Committee	ittee tee
Coincides with term on the Chautauqua Institution's Board of Trustees	;

#### **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

ii Coincides with term as President of Chautauqua Institution



