



## MISSION STATEMENT

Adopted by the Chautauqua Foundation Board of Directors, November 11, 2023.

The Chautauqua Foundation, Inc. exists to support the long-term sustainability of Chautauqua Institution with a particular focus on 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

It is with great pride that we deliver the 2024 annual report of the Chautauqua Foundation to you. 2024 was a momentous year in many important respects. From a historic perspective, it was the sesquicentennial anniversary of Chautauqua's Summer Assembly on the shores of Chautauqua Lake. Philanthropically during that milestone anniversary season, Boundless, A Campaign for Chautauqua grew close to its goal of \$150 million. And from the Foundation's perspective, market performance of 11%, together with more than \$5 million in gifts received for endowment, increased the endowment portfolio to \$145 million.

The Foundation remained focused and thoughtful in 2024. We implemented a transition from one hedge fund manager to another after careful consideration by our Investment Committee. We completed an extensive review of the governance documents of the Foundation, revising our bylaws to align membership criteria with our requirements for establishing new endowment funds, and adjusting director terms to improve the onboarding experience for new directors. Our staff continued their commitment to work closely with the Chautauqua Institution's Advancement and Program staff, helping to plan for and utilize each endowment fund to the maximum extent possible in accordance with the stated intentions of donors. Finally, we continued to create opportunities for the community to directly engage with the board and staff of the Foundation, expanding our communications and scheduling various in-person events throughout the summer.

2025 brings much potential as well as much change. Leadership of the Administration and the Board of Trustees of the Institution is in transition. At the same time, the Institution is facing critical budget pressures that will call on all of us to do our part to strengthen and sustain Chautauqua's operations. In the midst of those challenges, the Foundation stands poised to uphold its original statement of purpose as reflected at the front of this report — a purpose established in 1937, during another period of difficult financial circumstances, that impels us to support the Institution in carrying out and extending its critical mission.

With this time of transition comes tremendous opportunity. Opportunity to lead, opportunity to convene, opportunity to celebrate, reflect and plan for what the future of Chautauqua will be. There is opportunity to speak to future generations, building the infrastructure, programming and financial plans to carry Chautauqua forward with the strength it needs to carry out its work and maintain the physical place that is so central to the Chautauqua experience. There is opportunity to recommit, reminding ourselves why we love this place, this idea and this community.

Endowment represents long term commitment, confidence and passion, providing the only durable, reliable option to solving the perpetual financial hurdles Chautauqua faces. Imagine the extraordinary possibilities a substantially larger endowment could open up. What if the endowment covered the entire summer season? Or our ongoing capital maintenance needs? With buildings in top condition and systems providing better customer experiences, we could enable our incredible program staff to focus their talents on quality and innovation, rather than on balancing budgets. We could truly take on the most important issues of the day, convening the top experts and creating new channels for engagement, discernment and action. We could fully realize the mission, and the impact, of Chautauqua.

Now is the time to consider expanding your support of Chautauqua, financially and through engaging in the community through volunteer opportunities, welcoming newcomers, and inviting friends to learn more about this unique experience. Now is the time to demonstrate your passion in every way possible. Reach out to us and let us know what matters to you most and help us move forward from a place of strength. You can always stop by the Foundation office on the first floor of the Colonnade building, and we will be working together with the Office of Advancement to provide additional opportunities to engage with us throughout the summer. Watch your inbox, and *The Chautauquan Daily*, for more information about those opportunities.

We thank you from the bottom of our hearts for your love and support of Chautauqua. The Foundation remains committed to supporting this cherished place and programs, today and for generations to come.

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Sincerely,

## FINANCIAL REPORT

## **Financial Overview**

The net assets of the Foundation grew by nearly \$16 million in 2024, with the endowment portfolio producing a return of 11.4% in 2024 contributing \$14.9 million to the increase in net assets. The Foundation made \$5.1 million of endowment payout available to the Institution in accordance with the spending policy of the Foundation, while maintaining an administration expense level well below 1% of endowment net assets.

### **Foundation Net Assets**

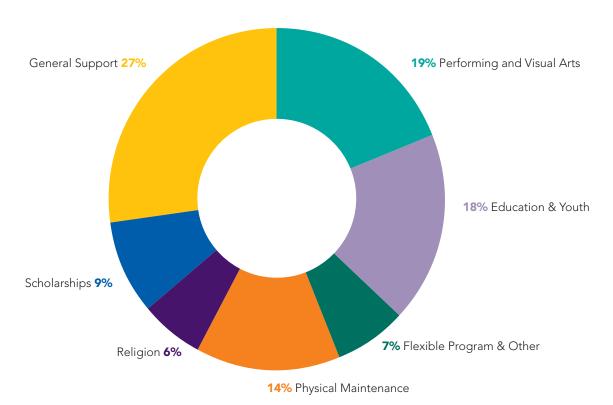
Total net assets of the Foundation are composed of gifts already received and the net appreciation of those gifts, as well as the net discounted value of certain commitments. The net assets of the Foundation have increased by \$69 million from \$83 million as of March 31, 2014, to \$152 million as of December 31, 2024.



## **Endowment Net Assets by Area of Support**

Endowment funds are composed 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 816 active endowment funds as of December 31, 2024, by area of support.



## **Number of Active Endowment Funds**

**775** 

**788** 

**794** 

**803** 

816

## FINANCIAL REPORT

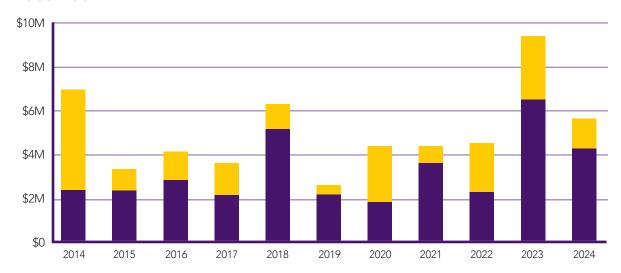
## **Endowment Fundraising Objectives**

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.

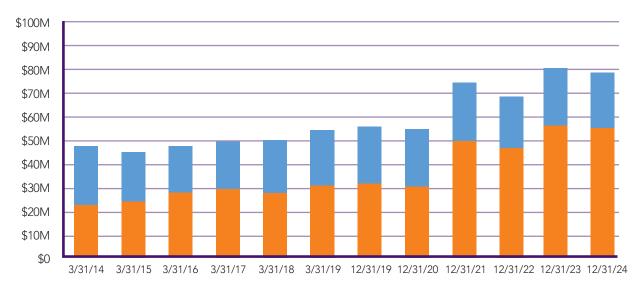
Realized Planned GiftsPledge Payments and Outright Gifts Received



## **Endowment Commitments**

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

UnspecifiedSpecified

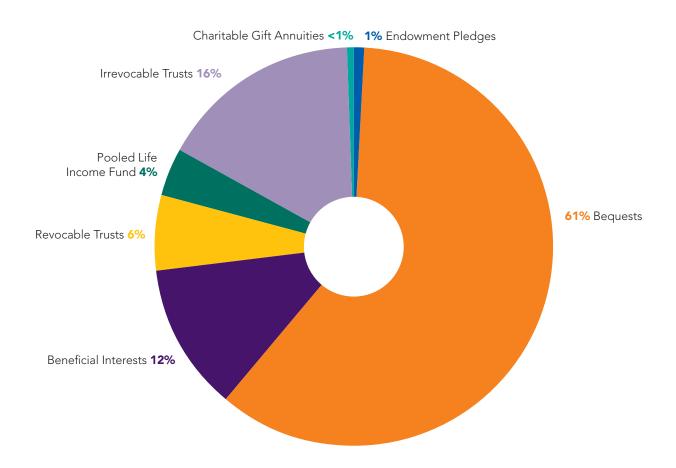


### **Future Commitments to Endowment**

The cumulative amount of future commitments to the Foundation was \$79 million as of December 31, 2024, 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 \$16.3 million and are recorded in the financial statements at net discounted values of \$815,000 for cash pledges and \$5.9 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 \$61.8 million, which represents bequests, revocable trusts and beneficial interests.



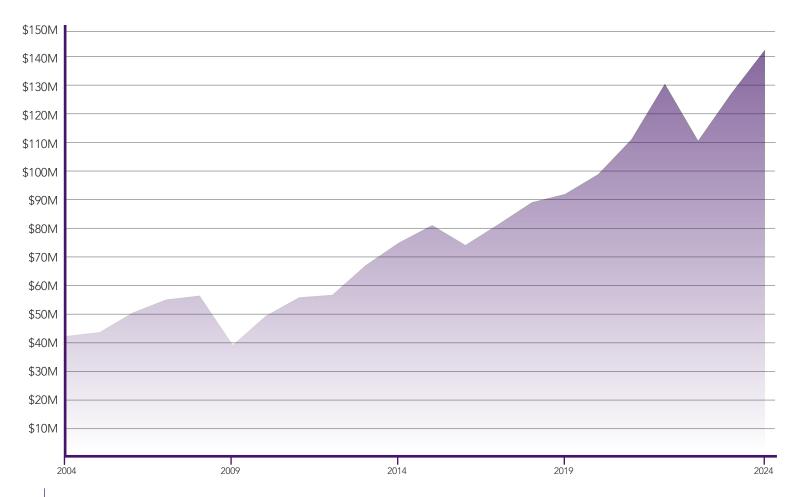
## FINANCIAL REPORT

## **Investment Management**

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 advisors, 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 main endowment portfolio, the Environmental, Social and Governance (ESG) investment portfolio, and a portfolio comprised of other restricted funds. The main endowment portfolio has a diversified asset allocation and includes an investment in a fund of hedge funds, which was previously managed by Pointer Management, LLC, and is now managed by Gerber Taylor.

The endowment has grown by \$104 million, from \$41 million as of March 31, 2004 to \$145 million as of December 31, 2024. The chart below represents the market value of the main endowment investment portfolio, the ESG portfolio, and the hedge fund portfolio.



### **Endowment Asset Allocation**

The market value of the endowment portfolio was \$145 million as of December 31, 2024, and has a diversified asset allocation in global equities, diversifiers and fixed income. Asset allocation is the primary driver of a portfolio's return, serving to determine risk exposure and return expectations and a reflection of the investment objectives and time horizon.

### **Global Equities**

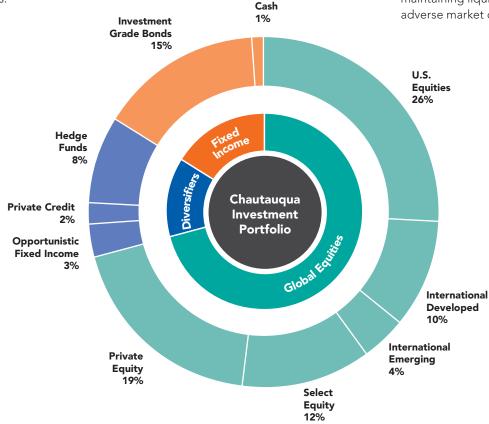
Investments in publicly traded stocks (passive and active strategies) and private equity that can grow in excess of spending and inflation but come with a high degree of volatility. These investments are diversified across geographic regions, sectors, and market capitalizations.

#### **Diversifiers**

Specialized investments designed to enhance return potential while reducing overall portfolio volatility, offering additional means of diversification beyond global equities and fixed income exposures.

#### Fixed Income

Investments that provide portfolio stability and income through exposures to government, corporate, and securitized bonds, while serving as a key component for capital preservation and risk mitigation. Fixed income also plays a critical role in maintaining liquidity across the portfolio in adverse market conditions.



## FINANCIAL REPORT

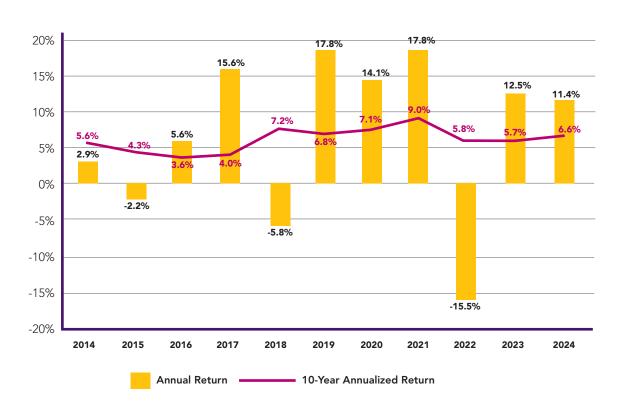
### **Annual Endowment Performance**

The Investment Committee regularly reviews investment policies, strategy, execution and performance, taking a long-term approach, over full market cycles, to assess the performance of the endowment portfolio, which grew by 11.4% in 2024 and had a 10-year annualized return of 6.6% as of December 31, 2024.

The committee views performance in the context of the portfolio's asset class holdings and a composite benchmark, which is net of fees and is diversified based on a strategic allocation, currently weighted 35% Russell 3000, 35% MSCI EAFE, 10% HFR Strategic and 20% BarCap Aggregate Bond. The portfolio has continuously exceeded the benchmark for 10-year annualized returns.

10-Year Annualized Returns

|                | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|----------------|------|------|------|------|------|------|------|------|------|------|------|
| 10-Year Return | 5.6% | 4.3% | 3.6% | 4.0% | 7.2% | 6.8% | 7.1% | 9.0% | 5.8% | 5.7% | 6.6% |
| Benchmark      | 4.9% | 4.0% | 3.0% | 3.7% | 6.7% | 6.5% | 6.7% | 8.2% | 5.4% | 5.3% | 6.0% |



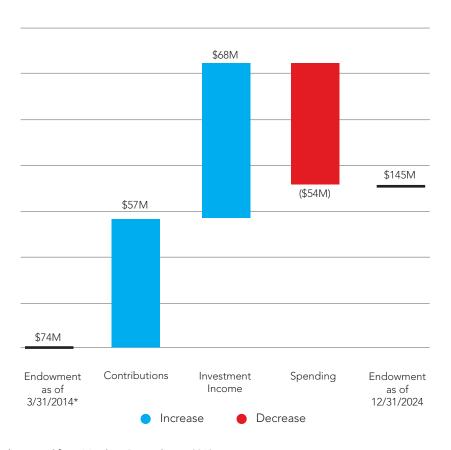
## **Financial Objective of Endowment Investment Program**

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.

## **Cumulative 10-Year Activity**

Over the past 10 years the endowment net assets have doubled from \$74 million to \$145 million. This chart shows the receipt of \$57 million in contributions and net investment income exceeding spending by \$14 million, growing the real market value to maintain purchasing power, while also supporting total spending of \$54 million over 10 years.



<sup>\*</sup>The Foundation changed its fiscal year end from March to December in 2019.

## REPORT OF INDEPENDENT AUDITORS

The Audit Committee reviewed and discussed the audited financial statements for the year ended December 31, 2024, 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, 2024 and 2023, 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, 2024 and 2023, 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 10, 2025

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# STATEMENTS OF FINANCIAL POSITION

| December 31,                          | 2024              | 2023              |
|---------------------------------------|-------------------|-------------------|
| Assets:                               |                   |                   |
| Cash                                  | \$<br>290,797     | \$<br>1,507,692   |
| Contributions receivable (Note 2)     | 814,584           | 685,595           |
| Investments (Note 3)                  | 144,998,078       | 129,356,788       |
| Split-interest agreements             | 5,909,228         | 4,872,505         |
| Other assets                          | 814,137           | 546,238           |
|                                       | \$<br>152,826,824 | \$<br>136,968,818 |
| Liabilities and Net Assets:           |                   |                   |
| Liabilities:                          |                   |                   |
| Due to the Institution (Note 4)       | \$<br>682,462     | \$<br>782,236     |
| Accounts payable and accrued expenses | 107,008           | 107,187           |
|                                       | 789,470           | 889,423           |
| Net Assets (Note 5):                  |                   |                   |
| Without donor restrictions            | 8,673,858         | 7,679,359         |
| With donor restrictions               | 143,363,496       | 128,400,036       |
|                                       | <br>152,037,354   | 136,079,395       |
|                                       | \$<br>152,826,824 | \$<br>136,968,818 |



# STATEMENTS OF **ACTIVITIES**

### For the year ended December 31, 2024

|                                       | Net Assets |                               |    |                            |    |             |
|---------------------------------------|------------|-------------------------------|----|----------------------------|----|-------------|
|                                       |            | Without<br>Donor Restrictions |    | With<br>Donor Restrictions |    | Total       |
| Revenues:                             |            |                               |    |                            |    |             |
| Contributions:                        |            |                               |    |                            |    |             |
| Endowment                             | \$         | 515,097                       | \$ | 6,488,489                  | \$ | 7,003,586   |
| Other                                 |            | -                             |    | 169,597                    |    | 169,597     |
| Change in value of                    |            |                               |    |                            |    |             |
| split-interest agreements             |            | (39,151)                      |    | (10,233)                   |    | (49,384)    |
| Investment activity, net              |            | 867,341                       |    | 14,024,300                 |    | 14,891,641  |
| Total revenues                        |            | 1,343,287                     |    | 20,672,153                 |    | 22,015,440  |
| Expenses: Program:                    |            |                               |    |                            |    |             |
| Endowment direct support              |            | 5,117,095                     |    | -                          |    | 5,117,095   |
| Support from other funds              |            | 138,543                       |    | -                          |    | 138,543     |
| General and administrative            |            | 801,843                       |    | -                          |    | 801,843     |
| Total expenses                        |            | 6,057,481                     |    | -                          |    | 6,057,481   |
| Net assets released from restrictions |            | 5,708,693                     |    | (5,708,693)                |    | -           |
| Change in net assets                  |            | 994,499                       |    | 14,963,460                 |    | 15,957,959  |
| Net assets - beginning                |            | 7,679,359                     |    | 128,400,036                |    | 136,079,395 |
| Net assets - ending                   | \$         | 8,673,858                     | \$ | 143,363,496                | \$ | 152,037,354 |

## For the year ended December 31, 2023

|                                       | Net Assets |                              |    |                            |    |             |
|---------------------------------------|------------|------------------------------|----|----------------------------|----|-------------|
|                                       | D          | Without<br>onor Restrictions |    | With<br>Donor Restrictions |    | Total       |
| Revenues:                             |            |                              |    |                            |    |             |
| Contributions:                        |            |                              |    |                            |    |             |
| Endowment                             | \$         | 1,723,843                    | \$ | 8,342,863                  | \$ | 10,066,706  |
| Other                                 |            | -                            |    | 19,894                     |    | 19,894      |
| Change in value of                    |            |                              |    |                            |    |             |
| split-interest agreements             |            | -                            |    | 355,543                    |    | 355,543     |
| Investment activity, net              |            | 819,930                      |    | 13,380,241                 |    | 14,200,171  |
| Total revenues                        |            | 2,543,773                    |    | 22,098,541                 |    | 24,642,314  |
| Expenses:                             |            |                              |    |                            |    |             |
| Program:                              |            | == .==                       |    |                            |    | == 0=0      |
| Endowment direct support              |            | 4,677,050                    |    | -                          |    | 4,677,050   |
| Support from other funds              |            | 1,061,811                    |    | -                          |    | 1,061,811   |
| General and administrative            |            | 758,658                      |    | -                          |    | 758,658     |
| Total expenses                        |            | 6,497,519                    |    | -                          |    | 6,497,519   |
| Net assets released from restrictions |            | 5,274,208                    |    | (5,274,208)                |    | -           |
| Change in net assets                  |            | 1,320,462                    |    | 16,824,333                 |    | 18,144,795  |
| Net assets - beginning                |            | 6,358,897                    |    | 111,575,703                |    | 117,934,600 |
| Net assets - ending                   | \$         | 7,679,359                    | \$ | 128,400,036                | \$ | 136,079,395 |

# STATEMENTS OF CASH FLOWS

| For the years ended December 31,                 |    | 2023         |                  |
|--|----|--------------|------------------|
| Operating activities:                            |    |              |                  |
| Change in net assets                             | \$ | 15,957,959   | \$<br>18,144,795 |
| Adjustments to reconcile change in net assets    |    |              |                  |
| to net cash flows from operating activities:     |    |              |                  |
| Net realized and unrealized gains on investments |    | (12,846,299) | (12,235,874)     |
| Changes in operating assets and liabilities:     |    |              |                  |
| Contributions receivable                         |    | (128,989)    | (131,276)        |
| Receivable from split-interest agreements        |    | (1,036,723)  | (565,622)        |
| Other assets                                     |    | (267,899)    | 36,487           |
| Due to the Institution                           |    | (99,774)     | (317,060)        |
| Accounts payable and accrued expenses            |    | (179)        | 18,387           |
| Net operating activities                         |    | 1,578,096    | 4,949,837        |
| Investing activities:                            |    |              |                  |
| Purchases of investments                         |    | (19,215,958) | (9,546,521)      |
| Proceeds from sales of investments               |    | 16,420,967   | 5,635,425        |
| Net investing activities                         |    | (2,794,991)  | (3,911,096)      |
| Net change in cash                               |    | (1,216,895)  | 1,038,741        |
| Cash - beginning                                 |    | 1,507,692    | 468,951          |
| Cash - ending                                    | \$ | 290,797      | \$<br>1,507,692  |

## 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 the long-term sustainability of Chautauqua Institution (the Institution) with a particular focus on the preservation, the appropriate use, and 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 10, 2025, the date the financial statements were available to be issued.

#### Tax Status

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

#### Cash

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

#### Investments

Investments are stated at estimated fair value. The fair value of marketable securities is determined by quoted prices in active markets. The Foundation uses net asset value (NAV) per share (or its equivalent) as a practical expedient to determine the fair value of investments that (i) do not have a readily determinable fair value predicated upon quoted prices in active markets, and (ii) have the attributes of an investment company or prepare their financial statements consistent with the measurement principles of an investment company (Note 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 \$16,347,000 and \$14,183,000 at December 31, 2024 and 2023.

#### Contributions

Unconditional 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.

Unconditional promises to give that are expected to be collected within one year are recorded at net realizable value. Unconditional promises to give that are expected to be collected in future years are recorded at the present value of estimated future cash flows. 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 \$61,799,000 and \$65,360,000 at December 31, 2024 and 2023.

#### 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:

|  | 2024                    | 2023          |
|--|-------------------------|---------------|
| Gross unconditional promises to give Less unamortized discount | \$<br>850,465<br>35.881 | \$<br>714,834 |
| -  | \$<br>814,584           | \$<br>685,595 |

Contributions receivable at December 31, 2024 are expected to be received over the periods shown below:

| Less than one year | \$<br>443,909 |
|--------------------|---------------|
| One to five years  | 406,556       |
|                    | \$<br>850,465 |

#### 3. Investments:

|                    | Qı  | uoted Prices in | Net Asset        |                   |
|--------------------|-----|-----------------|------------------|-------------------|
| 2024               | Д   | active Markets  | Value            | Total             |
| Money market       | \$  | 1,556,707       | \$<br>-          | \$<br>1,556,707   |
| Equities           |     | 59,229,471      | -                | 59,229,471        |
| Fixed income       |     | 24,914,281      | -                | 24,914,281        |
| Hedge fund         |     | -               | 11,587,833       | 11,587,833        |
| Private equity/cre | dit | -               | 30,878,594       | 30,878,594        |
| Select equity      |     | -               | 16,831,192       | 16,831,192        |
|                    | \$  | 85,700,459      | \$<br>59,297,619 | \$<br>144,998,078 |

#### 2023

| \$   | 1,907,270  | \$                                      | -                                       | \$  | 1,907,270   |
|------|------------|---|---|---|---|
|      | 55,164,292 |   | -                                       |   | 55,164,292  |
|      | 21,650,735 |   | -                                       |   | 21,650,735  |
|      | -          |   | 11,593,035                              |   | 11,593,035  |
| edit | -          |   | 24,774,229                              |   | 24,774,229  |
|      | -          |   | 14,267,227                              |   | 14,267,227  |
| \$   | 78,722,297 | \$                                      | 50,634,491                              | \$  | 129,356,788   |
|      | \$ edit    | 55,164,292<br>21,650,735<br>-<br>edit - | 55,164,292<br>21,650,735<br>-<br>edit - | 55,164,292 - 21,650,735 - 11,593,035 edit - 24,774,229 14,267,227 | 55,164,292 - 21,650,735 - 11,593,035 edit - 24,774,229 - 14,267,227 |

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

| 2024  |    | thout Donor<br>Restrictions | With Donor<br>Restrictions | Total            |
|---|----|-----------------------------|----------------------------|------------------|
| Dividends and interest, net \$ Net realized and | )  | 119,482                     | \$<br>1,925,860            | \$<br>2,045,342  |
| unrealized gains                                |    | 747,859                     | 12,098,440                 | 12,846,299       |
|   | \$ | 867,341                     | \$<br>14,024,300           | \$<br>14,891,641 |
| 2023  |    |                             |                            |                  |
| Dividends and interest, net Net realized and    | \$ | 127,563                     | \$<br>1,836,734            | \$<br>1,964,297  |
| unrealized losses                               |    | 692,367                     | 11,543,507                 | 12,235,874       |
|   | \$ | 819,930                     | \$<br>13,380,241           | \$<br>14,200,171 |
|   |    | ·                           | ·                          | ·                |

As of December 31, 2024, the Foundation has committed capital of approximately \$47,050,000 to private equity/credit investments and the remaining obligation under these commitments totaled approximately \$14,845,000.

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

2024

2022

|                       | 2024              | 2023              |
|-----------------------|-------------------|-------------------|
| Redemption frequency: |                   |                   |
| Daily                 | \$<br>85,700,459  | \$<br>78,722,297  |
| Quarterly             | 16,984,179        | 14,267,227        |
| Semi-annually         | -                 | 11,593,035        |
| Annually              | 11,587,833        | -                 |
| Nonredeemable         | 30,725,607        | 24,774,229        |
|                       | \$<br>144,998,078 | \$<br>129,356,788 |
|                       |                   |                   |

Nonredeemable investments consist of private equity/credit funds, which generally cannot be redeemed. Distributions from these funds are received as underlying investments are liquidated. At December 31, 2024, it is estimated the underlying assets will be liquidated over a period of approximately 5 to 15 years.

#### 4. Transactions with the Institution:

Distributions to the Institution primarily consist of appropriations from donor restricted endowment funds where the underlying restriction has been met and for purposes approved by the Foundation's Board. The total amount distributed in 2024 was \$4,916,399. The total amount distributed in 2023 was \$5,587,583, which includes \$953,341 from other funds that were at the discretion of the Institution. Amounts appropriated where the underlying restriction has not been met remain due to the Institution, which totaled \$682,462 and \$782,236 at December 31, 2024 and 2023, respectively.

Other transactions include reimbursements to the Institution for various personnel and administrative expenses. Amounts included in accounts payable and accrued expenses for these transactions totaled \$101,549 and \$93,240 at December 31, 2024 and 2023, respectively.

For the years ended December 31, 2024 and 2023, 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:

|                             | 2024            | 2023            |
|-----------------------------|-----------------|-----------------|
| Board-designated endowments | \$<br>8,673,858 | \$<br>7,679,359 |

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

|                                | 2021             | 2020             |
|--------------------------------|------------------|------------------|
| Gains - specified endowments   | \$<br>26,649,216 | \$<br>19,690,012 |
| Gains - unspecified endowments | 7,587,086        | 5,704,039        |
| Board - designated endowments  | 653,752          | 546,227          |
| Other restricted gifts         | 320,199          | 275,135          |
|                                | \$<br>35,210,253 | \$<br>26,215,413 |

2024

2023

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:

|   | <br>2024                       | 2023 |                          |  |
|---|--------------------------------|------|--------------------------|--|
| Specified endowments Unspecified endowments | \$<br>80,765,054<br>27,388,189 | \$   | 76,564,321<br>25,620,302 |  |
|   | \$<br>108,153,243              | \$   | 102,184,623              |  |

#### 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 \$22,000 and \$21,000 for the years ended December 31, 2024 and 2023.

## 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. The board-designated endowments are in accordance with the Board's policy to include in its 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. Additional distributions from the board-designated endowment funds may be 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 without purpose or time restrictions is shown as an increase (decrease) in net assets without donor restrictions. Investment activity 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 assets activity, excluding receivables and split-interest agreements, is as follows for the years ended December 31:

|                                      |    | thout Donor estrictions |    | With Donor | Rest | trictions   |                   |
|--------------------------------------|----|-------------------------|----|------------|------|-------------|-------------------|
|                                      |    | Board-                  |    | Board-     |      | Perpetual   |                   |
| 2024                                 | D  | esignated               | D  | esignated  |      | Endowment   | Total             |
| Endowment assets – beginning of year | \$ | 7,679,359               | \$ | 546,227    | \$   | 122,020,574 | \$<br>130,246,160 |
| Investment activity                  |    | 867,341                 |    | 61,784     |      | 13,948,507  | 14,877,632        |
| Contributions                        |    | 333,988                 |    | 70,624     |      | 4,944,864   | 5,349,476         |
| Other adjustments                    |    | -                       |    | -          |      | 439,013     | 439,013           |
| Appropriated                         |    | (348,788)               |    | (24,883)   |      | (5,545,267) | (5,918,938)       |
| Endowment assets – end of year       | \$ | 8,531,900               | \$ | 653,752    | \$   | 135,807,691 | \$<br>144,993,343 |
| 2023                                 |    |                         |    |            |      |             |                   |
| Endowment assets – beginning of year | \$ | 5,426,178               | \$ | 466,383    | \$   | 105,908,480 | \$<br>111,801,041 |
| Investment activity                  |    | 794,508                 |    | 59,637     |      | 13,306,453  | 14,160,598        |
| Contributions                        |    | 1,723,843               |    | 42,999     |      | 7,480,375   | 9,247,217         |
| Other adjustments                    |    | -                       |    | -          |      | 468,212     | 468,212           |
| Appropriated                         |    | (265,170)               |    | (22,792)   |      | (5,142,946) | (5,430,908)       |
| Endowment assets – end of year       | \$ | 7,679,359               | \$ | 546,227    | \$   | 122,020,574 | \$<br>130,246,160 |

# NOTES TO FINANCIAL STATEMENTS

### 9. Expenses by Nature and Function:

| 2024                            |    | Program   | General and Administrative |         | Total           |
|---------------------------------|----|-----------|----------------------------|---------|-----------------|
| Fund appropriations             | \$ | 5,117,095 | \$                         | -       | \$<br>5,117,095 |
| Support from other funds        |    | 138,543   |                            | -       | 138,543         |
| Personnel costs                 |    | -         |                            | 373,779 | 373,779         |
| Institution supporting services |    | -         |                            | 250,000 | 250,000         |
| Travel and hospitality          |    | -         |                            | 106,927 | 106,927         |
| Professional and consulting     |    | -         |                            | 31,846  | 31,846          |
| Other                           |    | -         |                            | 39,291  | 39,291          |
|                                 | \$ | 5,255,638 | \$                         | 801,843 | \$<br>6,057,481 |
| 2023                            |    |           |                            |         |                 |
| Fund appropriations             | \$ | 4,677,050 | \$                         | -       | \$<br>4,677,050 |
| Support from other funds        |    | 1,061,811 |                            | -       | 1,061,811       |
| Personnel costs                 |    | -         |                            | 354,429 | 354,429         |
| Institution supporting services |    | -         |                            | 250,000 | 250,000         |
| Travel and hospitality          |    | -         |                            | 50,954  | 50,954          |
| Professional and consulting     |    | -         |                            | 73,347  | 73,347          |
| Other                           |    | -         |                            | 29,928  | 29,928          |
|                                 | \$ | 5,738,861 | \$                         | 758,658 | \$<br>6,497,519 |

The financial statements report certain categories of expenses that are attributable to program and supporting functions, which are directly charged to the functions benefited.



## JACK CONNOLLY

## Jack Will Always be Mr. Chautauqua

Jack Connolly had almost as many names as he had titles. Jack, Pop Pop, Big Cat, and most endearingly, Mr. Chautauqua. His list of titles is a bit longer: president of Chautauqua Golf Club's Board of Governors, Opera Guild board member, Chautauqua Institution Trustee, co-chair of the Chautauqua Fund, member of the Planned Gift Committee, and volunteer for the Challenge, Idea, and Promise campaigns. He was also a member of the Chautauqua Foundation Board of Directors where over his years of service he served as Chair of the Development Council, Finance, Personnel, and Nominating and Governance committees. Jack was the first vic gelb Heart of Chautauqua Service Award winner, given periodically to Chautauquans who have demonstrated an extraordinary commitment to volunteerism.

His longtime friend Fred Gregory knows all those titles by heart and added one more saying, "Jack (Big Cat) Connolly was my true Chautauqua mentor. He preceded me as president of the Chautauqua Golf Club, the Foundation, and the Chautauqua Fund. He was also a member of the Community Band and Thursday Morning Brass where I occupied the seat next to Jack. No one taught me more about the wonders of Chautauqua and why we should give back when possible. To me, Jack will always be Mr. Chautauqua!"

Giving back was something in which Jack and his wife Marcia believed strongly. "Both of my parents believed in giving back and paying it forward," said their daughter Melissa Orlov. "Dad also believed in a shared sense of purpose at Chautauqua. Chautauqua is about a blending of the pillars, and they wanted to help it thrive."



Their passion for Chautauqua's offerings and community would lead to five endowments in their name and generations of deep connections with every aspect of life on the grounds.

- Jack and Marcia Connolly Fund for Chautauqua
- The Connolly Family Fund for Opera
- Connolly Residence Hall Endowment
- Connolly Endowment for Chautauqua
- Jason and Nancy Weintraub Chautauqua Community Band Endowment

"They enjoyed all that Chautauqua had to offer-especially the music. My dad loved the music," added Melissa. "And he was always out there sharing his love of the place and making people feel welcome."

John Connolly, Jack and Marcia's son, echoed his sister's recollections of service. In addition to his father's generosity and belief in giving and serving, Jack was collaborative, noting, "In the more than twenty years that he served there, he was a really good problem-solver, and he listened to others' opinions. He really believed in civility and dialogue and listening." Jack passed this belief down to his children, "He always impressed upon us that even the busiest people should make time for the people in their life who matter."

Jack's ability to be there for others in a very individual way resonated beyond his family. Former Chautauqua Foundation Board Member, current Chautauqua Institution Trustee and longtime friend Karen Goodell considers Jack one of the truly great Chautauquans saying, "What made Jack so special was not just his leadership, but also the way he connected with people. He had a gift for making every board member feel seen and valued, and he always went out of his way, especially for newcomers. I too was lucky to call him a mentor. He made sure I had everything I needed to thrive, and he never forgot to make the work meaningful and fun. I'll always remember Jack for his sharp insights, his eye for detail, and above all, for making me feel like a trusted friend."

Jack's love of Chautauqua was a family affair that began with his grandparents and was shared and strengthened by his wife and children. "Jack and Marcia had a deep and abiding partnership in which they shared a passion for music, family, community and learning," said former Chautauqua Institution President Thomas Becker. "They invested in all these things at Chautauqua. They gave their time, resources, and talents in a joyful and expressive fashion. They nurtured a broad community of understanding and commitment to the ideals of the Institution."

Jack viewed Chautauqua as a place where everyone should be welcomed, where everyone has the opportunity to contribute, and where putting in energy allows one to draw even more energy out. "I first got to know Jack in 2002 when I was a fledgling Chautauqua Fund volunteer and he and Marcia were the Fund's charismatic, glamorous co-chairs — the first married couple to serve in that capacity." said Chautauqua Foundation Board Chair Tim Renjilian. "As part of their role, they met with each of the different volunteer teams, providing information and, more importantly, encouragement to the volunteers. Jack was such a powerful and effective leader, not only inspiring us to believe in the importance of Chautauqua as a worthy recipient of philanthropy but also convincing us that we would actually go out and be successful fundraisers."

In a life filled with many demands and responsibilities outside the gates, Chautauqua was like nowhere else for Jack Connolly noted his son John. "My dad searched around for who he was for a while and he realized he was a Chautauquan first and foremost."

## **ENDOWMENT FUNDS**

### **UNSPECIFIED FUNDS**

Provide general support to Chautauqua Institution

\$39,315,080 Net Assets \$1,399,666 Support to the Institution

Funds invested in the ESG portfolio are indicated with a purple dot. New funds are designated in orange.

Paul M. Alexander Fund

John E. Anderson Endowment 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 Chautaugua

Gordon Benn Fund

Alan J. and Mary Hough Blair Fund

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

Clyde L. Carnahan Endowment

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

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

The Bettsy and Ellis Cowling Endowment 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 Chautauqua

Martha T. and Morgan O. Doolittle Fund

Lora Lee and Bob Duncan 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

Lois T. Galloway Endowment for Chautaugua

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

T: 1 1 1 1 1 1 5

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

Samuel and Margaret Hazlett Fund

Charles H. Heinz Fund

Lisa Heinz Endowment for Chautauqua

Dorothy S. and William F. Hill, II Endowment for Chautauqua

Holden Family Fund

The Burritt and Joanne Hubbard Family Fund Margaret A. Hukill Endowment for Chautauqua

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

Verna Jackson Memorial Endowment for Chautauqua

James Family Fund

Donald D. Jansen Endowment for Chautauqua

Katherine King Karslake Fund

Keane Family Endowment for Chautauqua Ronald L. and Rosie C. Kilpatrick Endowment

Georgiana Bole King Endowment

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

Jeannette B. Mainwood Fund

Gerald and Dorothea Maloney Endowment

Clara Masik Endowment

Lillian W. Masters Endowment for Chautauqua

Candace and Scott Maxwell Fund

Mary Jane and Donald McClurg Endowment Rev. Susan McKee and Hal Simmons Family Fund

Margaret C. Mercer Endowment

Carrie Dunkle Miller Endowment for Chautauqua

Richard H. Miller Fund

Dawson E. and Charlotte B. Molyneaux Endowment

Jane C. Morgan Fund

Lewis W. & Katherine C. Morgan Fund

James R. Morris III Fund

The George E. and Susan Moran Murphy Family Fund

Orlov Family Fund for Chautauqua Robert B. and June A. Osburn Fund

Robert Pace Endowment Fund

Mary C. and James A. Pardo, Jr. Endowment for Chautauqua

Mary C. and William H. Park Fund

Mary Lou Cady Parlato Endowment for Chautauqua

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 Chautaugua

Helen Pickup-Hyman Fund Mary Ellen Pindyck Fund

Sam and Petey Tinkham Price Family Fund

Evelyn Joyce Ramsdell Fund Mary Oram Reading 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

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 Chautaugua

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

Allen and Elaine Short Endowment for Chautauqua

Bert W. and Joanne R. Simons Endowment

Elizabeth M. Smith Memorial Endowment for Chautaugua

## **ENDOWMENT FUNDS**

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 Chautaugua

Nina and Norman Wain Family Endowment for Chautaugua

Carolyn and Bill Ward Endowment for Chautauqua

Evelyn Wargo Endowment

Charles and Lois Weaver Fund

Herbert and Lorraine Weier Endowment

Nina T. Wensley Fund

Helen N. White Fund

Robert O. Wilder Family Fund

Jack A. and Muriel Winter Endowment Fund

Jack R. Winter Fund

Michael Winter Fund

Betty Offutt Wood and BRAVAS Endowment for Chautaugua

Susan O. Wood 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

Chautaugua

General Endowment Fund

## **SPECIFIED FUNDS**

Provide support to Chautauqua Institution in accordance with the specific purpose designated by the donor

\$105,226,017 Net Assets \$3,717,429 Support to the Institution

New funds are designated in orange.

# PHYSICAL MAINTENANCE FUNDS

\$19,991,083 Net Assets \$719,516 Support to the Institution

Buildings and Structures \$17,299,285 Net Assets \$622,147 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

Frank and Sally Moore Fund for Boys' and Girls' Club

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 \$1,951,522 Net Assets \$70,642 Support to the Institution

The Reid B. Babcox Memorial Garden Terrace Endowment

The Bell/Ritts Garden Fund

Arline and Ralph Bernstein Memorial Rain Garden Fund

The Bishop's Garden Fund

Selina W. Braham Memorial Garden Fund

Judge W. Walter Braham Garden Fund

Dr. Daniel and Wanita Bratton Garden Fund

The Henrietta T. Campbell Garden Fund

Carnahan-Jackson Memorial Garden Fund

The Carothers Family Garden Fund

The Kirk David Casto Memorial Garden Fund

Jean Chadwick Memorial Garden Fund

The CLSC Class of 1982 Helen W. Giacobine Garden Fund

Connolly Family Gardens and Fountains Endowment

The Cornell Garden Fund

DeeDee's Garden Endowment

The Clara Goodmote and Robert George Garden

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

## **ENDOWMENT FUNDS**

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 \$740,275 Net Assets \$26,727 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**

\$25,491,705 Net Assets

\$851,277 Support to the Institution

## Lectureships \$13,301,972 Net Assets \$488,977 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 "Chautauqua 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

Susie Leibowitz Kuhn Endowment Fund for Chautaugua

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

SR Pieper Family Servant Leadership Lecture 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 \$2,338,989 Net Assets \$81,581 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 \$937,978 Net Assets \$29,633 Support to the Institution

Ward T. Bower Youth Activities Memorial

#### Al Dibs Endowment for the YAC

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

## \$8,912,767 Net Assets \$251,086 Support to the Institution

Batten Climate Initiative Endowment

Lillian Brink Education Fund

CLSC Class of 1992 Endowment

Barbara R. Foorman Science Literacy Endowment

McCredie Family Director of Boys' and Girls' Club

Emily and Richard Smucker Directorship for Education

Peter Nosler Director of Climate Initiative

## AL DIBS ENDOWMENT FOR THE YAC

For anyone whose childhood summers were spent at Chautauqua, the conversation always turns to the YAC. The Youth Activities Center, beloved as the YAC, recalls so many emotions, laughter, vivid memories, and milestones that year after year spawned lifelong relationships, friendships and bonds across families and generations. It is a gathering place, a game room, a launching pad, even a first employer. And for 40 years, whether the YAC was where you learned to budget your allowance to buy your favorite candy, navigate your first crush, try some dance moves, or wait patiently in line for a Western Burger, Al Dibs was there. He was the adult you knew was in charge and always had something fun planned. He remembered everyone's name, and always, somehow, knew the right thing to say on your best days and especially on those bumpy days of childhood.

"The YAC was the place to be. And Al was flexible enough to let you be a kid, to fail, and bounce back," said Mark Ritacco. Mark grew up as one of those YAC kids (yes, of the original YAC PAC softball team) who cannot think of his days and years there without thinking of Al Dibs. He is one of the main reasons why Mark and his wife Ann Ayers, Katie Prechtl Cooke and Erin Cornelius created the Al Dibs Endowment for the YAC. "Growing up, you said, "My group..." and you meant the kids you hung out with at Club and the YAC," said Katie Prechtl Cooke. Erin added, "And Al was always there for you — to help you and listen to you." With the tradition of the YAC passed down to their own children, they realized how special this time now is for them, and how formative a place the YAC continues to be for hundreds of young Chautauquans.

Creating the endowment was driven by necessity but also out of inspiration. After their fundraising success in the establishment of the Timothy Ritacco Play Area Endowment, in honor of Mark and Ann's son, they, along with Katie and Erin realized that the power of philanthropy can generate both awareness of need and an incredible outpouring of generosity from the community with whom they already share a bond they forged in their own childhoods here. With active fundraising beginning in 2024, the endowment had already raised more than \$100,000 by the end of the year, and a recent gift from the Braham family puts the endowment's goal of \$250,000



in sight. "My parents would be proud of this effort in pursuit of something pure Chautauqua," said Andy Braham. "My dad was a lifelong Chautauquan who went to Boys' and Girls' Club along with all of his kids and grandchildren. He firmly believed in the value of great activities for kids and adults alike. The YAC is an important beginning of youth independence in Chautauqua's history dating back to its start when Al hired my sister Betsy Simons and Dave Zarou as the YAC's first two employees. Dave even had two custom hats made to commemorate that special summer. We are proud to support this amazing place and all it represents."

Al Dibs, himself, is deeply touched to know how much the YAC means to so many families and how they have expressed their appreciation through this endowment, saying, "I am humbled and honored that the YAC has become such an important piece of Chautauqua life for so many people, and am thrilled that this endowment will make this experience possible for years to come. This program has always had one defining goal: make this a safe place for kids to be kids. I am forever grateful to the Chautauqua community members who came together to create this."



# **ENDOWMENT FUNDS**

# PERFORMING & VISUAL ARTS FUNDS

\$28,016,548 Net Assets \$1,008,740 Support to the Institution

# General \$5,033,690 Net Assets \$185,989 Support to the Institution

The John T. and Katherine G. Bailey Family Fund

The Evie and Stacey Berger Endowment for Popular Entertainment

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

# \$5,649,364 Net Assets \$193,648 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

Chautaugua 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

#### Dr. Cheryl Gorelick and Jacob Zeigler Opera Endowment

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 for Opera

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**

# \$6,150,150 Net Assets

# \$226,140 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

Geller Family Fund for the Chautauqua Symphony

Heitzenrater Family Chautaugua Symphony Orchestra Fund

The William M. Kinley Fund for the Chautaugua 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 Linda and Saul Ludwig Endowment

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 Chautaugua 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 \$1,486,260 Net Assets \$54,619 Support to the Institution

The Arnold and Jill Bellowe Fund for Theater

The Nancy E. Brewer Fund for Theater

Chautaugua Theater Fund

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**

### \$3,306,498 Net Assets \$113,376 Support to the Institution

The Paul and Toni Branch Fund for Dance

The Carnahan-Jackson Artistic Director of Chautauqua School of Dance Endowment

The Carnahan-Jackson Dance Endowment

Chautaugua Dance Endowment

Dakin Family Fund for Dance

The W. Jane Foster and Arthur S. Willson Artistic Director of  $\,$ 

Chautauqua School of Dance Endowment

Craig and Cathrine Greene Family Fund

Terrie Vaile Hauck Dance Endowment

Sasha Janes Fund for Dance

Moore Fund for Dance

# Visual Arts \$3,358,387 Net Assets \$123,012 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

# **ENDOWMENT FUNDS**

#### Other

\$3,032,199 Net Assets \$111,958 Support to the Institution

Court Family Endowment

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**

\$9,005,945 Net Assets \$322,129 Support to the Institution

#### General

\$2,085,511 Net Assets \$77,076 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**

\$1,532,845 Net Assets \$49,409 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

Reverend Leonard J. Ebel Chaplaincy

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

\$2,108,788 Net Assets \$77,426 Support to the Institution

Glenn R. Bucher Memorial Lectureship

Carnahan-Jackson Religious Lectureship

The Jack and Elizabeth Gellman and Zaretsky Family Fund

The Ralph W. Loew Religious Lectureship Fund

The Robert S. Lucas, Sara M. Lucas, and Sylvia Lucas Miller Religious Lectureship

Eileen and Warren Martin Lectureship Fund for Emerging Studies in Bible and Theology

Eugene Ross McCarthy Memorial Fund

Rachel Alice Miller Memorial Fund

Deloras K. and L. Beaty Pemberton Lectureship

The Presbyterian Association of Chautauqua Religious Lectureship

Arthur and Helen Reycroft Memorial Religious Lectureship Fund

Gertrude Elser Schroeder Fund

The H. Parker and Emma O. Sharp Lectureship Fund

Rabbi Samuel and Lynn Stahl Lectureship for the Understanding of Judaism

#### Other

\$3,278,800 Net Assets \$118,218 Support to the Institution

Alice A. Allen Fund

John E. Anderson Religion Endowment

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

Campbell Department of Religion Audio-Visual Fund

Joan Brown Campbell Department of Religion Endowment

Chautauqua Choir Endowment

The Chautaugua Fund for Sacred Music

Fund for the Exploration of World Religions and Spiritual Practices

The Jack and Gretchen Grigsby Fund for Choral Enrichment

The Holden-Daney Fellowship Fund

Dr. William N. Jackson Religious Initiative Fund

Jared Jacobsen Endowment for Organ

Arville G. Light, Jr. Fund for Religion

The Myra Baker Low and Katharine Low Hembree Family Fund

S.R. and Jennie Hamill McClure Family Fund

Harold F. and Mary Lou E. Reed Family Fund

The Reeve Family Choir Music Fund

Religious Initiatives Fund

The Ann Simpson Rice Flower Fund

Gladys Alcorn Rogers Memorial Fund

The Allen Steere, Sr. Fund for the Department of Religion

### **SCHOLARSHIP FUNDS**

\$12,596,926 Net Assets \$444,934 Support to the Institution

A. Chace Anderson Fine and Performing Arts Scholarship

Peggy and Andy Anderson Family Scholarship Fund

Richard W. Antemann Memorial Scholarship

Barakat Scholarship

The Michael L. Barnett Scholarship Fund

Barton Family Scholarship

Bell Tower Scholarship Fund

The Jill W. Bellowe Chautauqua Conservatory Theater Scholarship

The Chuck Berginc Scholarship

Dr. and Mrs. Arthur E. Bestor Scholarship Fund

The Frances Black Scholarship Fund

The Margaret B. Blossom Scholarship

Bonnefoux/McBride Dance Scholarship

June and Albert Bonyor Scholarship Fund for Ballet

Alexander W. & Edna L. Bouchal Memorial Scholarship

Ward T. Bower Memorial Scholarship

Frederick Percival Boynton Scholarship

JoAnn and Gene Buffo Voice Scholarship

Lowell and Frances Hyam Brentano Fund

The Anne C. Britton Memorial Scholarship

The Charles and Ethel Brody Theater Scholarship

The Gladys Brooks Scholarship Endowment Fund

The Indiana – Leslie Bryan, Jr. and Peggy Hoover Bryan Voice Award

Shirley Budke Memorial Fund for Blind Students

The Edwin L. Bullock Scholarship

The Lillian B. Bullock Scholarship

Anne S. Burden Music Scholarship

Bennett and Mary Jo Burgoon Memorial Scholarship

Sarah Miller Caldicott Piano Scholarship

The Andrew L. and Gayle Shaw Camden Fund for Theater Arts

The Carnahan-Jackson Scholarship Fund

The Chautaugua Art Scholarship

Chautauqua Dance Circle Bonnefoux McBride Endowment for Scholarship

The Chautauqua Golf Club Scholarship Fund

The Chautaugua Theater Scholarship

The Chautauqua Voice Scholarship

Clark Scholarship Fund

Joseph Clarke Scholarship Fund

Clarkson Family Scholarship

The Theodore R. Colborn Scholarship

The William Cole/King Scholarship

Beverly and Bruce Conner Scholarship Fund

James and Barbara Copeland Scholarship Fund

The Bettsy and Ellis Cowling Scholarship for Music

Wally and Virgina Cox Voice Scholarship

The Daley Family Fund

Eleanor B. Daugherty Scholarship Fund

Elaine and Erroll Davis Scholarship for MSFO

Diamond Jubilee Class of 1948 Scholarship

Mary Lowe Dickinson Fund

Patricia and Robert Dietly Memorial Scholarship

Dietrich Family Endowment for Music at Chautaugua

The Mardelle Dressler Dobbins Scholarship

The Rachel W. Eaton Scholarship

The Bina Edkin Eckerd Memorial Fund for the Fine and Performing Arts

# **ENDOWMENT FUNDS**

The Robert Hunt and Mary Campbell Eckhardt Memorial Scholarship

David and Miriam Yanes Eddleman Voice Scholarship

The Miriam Yanes Eddleman Dance Scholarship

David Effron Conducting Fellowship

The Michael and Jane Eisner Scholarship Fund

Mary Cummings Paine Eudy Scholarship

The Falk Scholarship Fund

Family Scholarship Endowment

The Agnes H. and Hal A. Fausnaugh Chautauqua Conservatory

Theater Scholarship

Beverly and Marvin Fiegelman Scholarship Fund for the Performing

Arts

Genevieve Foote Findley Scholarship

Ted and Deborah First Scholarship

Edith Reid Flaster Memorial Dance Scholarship

The Luella Morris Forney Memorial Scholarship

Wilbur D. Forney Memorial Scholarship Fund

Dr. Stephen Fudell Memorial Scholarship Endowment

The Harriet B. and Ralph T. Geller Memorial Scholarship

Marjorie Geller Memorial Dance Scholarship

The Gellman Scholarship Fund

General Scholarship Fund

The Howard G. Gibbs Scholarship Fund

Sheila Gitlitz Scholarship Endowment

The Gitlitz Scholarship Fund for Visual Arts

Glendorn Foundation Scholarship Fund

Golay-Bradford Endowment for Families

The Rosalyn Goldberg Scholarship Fund

The Toni and Joseph Goldfarb Scholarship Fund for Fine and

Performing Arts

The Alfred E. Goldman Scholarship

The Jessie D. Grassie Class of 1882 Scholarship

Esther Greene Endowment for Diversity

Franklin P. & Fern Green and William P. & Ruth Bates Art Scholarship

The Groff-Simpson Family Scholarship

Grover Family Scholarship Fund

G. Thomas & Kathleen Harrick Music Scholarship

Harris Scholarship for Performing Arts

Veda M. Hartman Memorial Scholarship

Paula and Ray Hecker Dance Scholarship

Ruth Higby Haver and Della and David Higby Music Scholarship

Mak and Hersh Family Music Scholarship

William and Pauline Higie School of Dance Scholarship

William and Pauline Higie School of Music Scholarship

Robert P. Hiller Scholarship Fund

The Arthur and Arlene Holden Scholarship for Chautauqua

W.T. Holland Memorial Piano Scholarship Endowment

Elke Kieserling Hoppe Scholarship

Cyril T.M. Hough Memorial Scholarship Fund

Ruth M. Skinner Hutchins Scholarship Fund

Innes Family Scholarship for Studio Arts

The Dorothy M. Jackson Memorial Scholarship in Piano

The Lucinda Ely Johnson Scholarship

The Max and Edythe Kahn Scholarship Fund

The Nancy and Norman Karp Scholarship Fund

Charles and Naomi Kaufman Voice Scholarship

Thomas E. Kaufman Memorial Music Scholarship

The Kaylor Family Scholarship

The Danny Kayne Music Scholarship Fund

Jonathan Keeley Voice Scholarship

Audrey and Kenny Koblitz Scholarship

Konneker Scholarship

The John and Mary Lou Kookogey Scholarship

The Kullberg Scholarship

Felicia and Andy Landis Memorial Fund

The LaPenna-Koch Scholarship

The Marilyn G. Levinson and Nathan Gottschalk First Chair Award for

MSFO Endowment

Craig J. Luchsinger Memorial Scholarship for Violin

The Anna Mary and Richard M. Maddy Music Scholarship Fund

Marlena Malas Scholarship Fund

Marianne Elser Markham Endowment Fund

Lillian W. Masters Scholarship Fund

The Lucille J. McClure Memorial Music Scholarship Fund

Roberta J. McKibbin Memorial Scholarship for Visual Arts

Everett and Sarah Holden McLaren Scholarship

Samuel R. McClure II Brass Scholarship

Milks Family Scholarship for Brass Music

David L. and Jane K. Miller Art Scholarship

Laurie Miller Piano Scholarship

Laurie Miller Voice Scholarship

Ralph E. Miller Memorial Scholarship for Music

The Ralph J. Miller and Florence L. Miller Memorial Scholarship in Music

The Sylvia Lucas Miller Scholarship in Music

The William E. Miller, Jr. Theater Scholarship

The Augusta L. Ebert Molyneaux Scholarship

The Elmer G. Molyneaux Scholarship

The Mary Louise Molyneaux Scholarship

Moore Scholarship Fund for Music

Jack I. and Barbara J. Morris Memorial Cello Scholarship

Gertrude T. Munger Piano Award Fund

The Abe Neches Scholarship for Dance

The Marian A. Neubauer Scholarship

Lily Lee Nixon Fund

The Fayette S. Olmstead Foundation and Pittsburgh National Bank Charitable Trust Fund

The Bernard Paul Memorial Scholarship Fund

Mary Elizabeth Peffer Music Scholarship

Rosalie H. Pembridge Dance Scholarship

Pennsylvania Scholarship Fund

Pennybacker Memorial Scholarship

Charles John Petre Memorial Fund Trombone Award

William and Jane Pfefferkorn Scholarship for Music

The Ernest W. and Jeannette McClure Polley Scholarship

Av and Janet Posner Music Scholarship

Henry Rauch Memorial Scholarship

The Douglas A. Raynow Memorial Scholarship

Robert D. Redington Memorial Scholarship

The Reed Family Scholarship

Joseph W. and Marilyn Hyder Richey Scholarship Endowment

Rizzolo Family Fund

Roblee Scholarship for Families

Joseph H. and Florence A. Roblee Scholarship

The Catherine Prussing Rodgers Scholarship

The Josette and Ronald Rolley Scholarship

Bonnie Rosenthal Dance Scholarship

Mary McQueen Ross Scholarship

Glen and Ruth Roush Scholarship Fund

The Richard B. Rubin Scholarship Fund

Elmer S. and H. Lorraine Sachse Scholarship Fund

The Sack Family Scholarship

Ann and Isidor Saslav Violin Scholarship in Honor of Mischa

Mischakoff

James Scamman Memorial Scholarship

The Henrietta W. Schlager Scholarship

The Charles G. Schwartz Scholarship

Kuniko Washio Scollard Scholarship Fund for Music

The Sabina Mooney Seifert Memorial Scholarship

Shreveport Friends' Music Scholarship

A. Pope and Peggy B. Shuford Dance Scholarship

Ronald Perry Smith Scholarship Fund

The Dr. William T. and Virginia W. Smyth Fund

Soulful Bliss Fund

The Suzanne Gaider Sroka Scholarship

The Madge Ryan Stirniman Scholarship

George and Marianne Strother Scholarship Fund

Dessie B. Tichenor Scholarship Fund

Barbara and Albert Turbessi Memorial Scholarship

Tustin Memorial Fund

Alfredo Valenti Scholarship Fund

Glenn G. Vance Music Scholarship Fund

Donald Welch Memorial Scholarship Fund

Nina T. Wensley Scholarship

Katherine Karslake White School of Music Scholarship

Wiebenga Family Fund

The Rachel Wilder and Phil Lerman Scholarship

Victoria Willen Scholarship Fund for the Arts

The Mark W. Williams Scholarship

Mary Chenoweth Wright Scholarship Endowment

The Harriet G. Yanes Dance Scholarship

The John B. Yoder Music Scholarship

Chadwick Young Scholarship

# **ENDOWMENT FUNDS**

#### FLEXIBLE PROGRAM FUNDS

\$6,034,988 Net Assets \$220,588 Support to the Institution

The Bromeley Family Fund

The Carnahan-Jackson Foundation Fund for Chautaugua

The Chautauqua/Jamestown Fund for Education, Religion and the Performing Arts

Connolly Endowment for Chautauqua

The Winifred S. Dibert Fund for Chautauqua

Elizabeth Elser Doolittle Endowment Fund for Adult Programming

H. David Faust Leadership Fund

Scott and Patti Fine Endowment Fund

The First Family Fund

The George and Julie Follansbee Family Fund

The Jane Robb Shaw Hirsh Endowment

The Jim and Lynn Gasche Levinson Fund for Chautauqua

Locke-Irwin Fund

The Loynd Family Fund

Jeffrey Lutz and M. Cathy Nowosielski, MD Endowment

The Mackenzie Fund for Chautauqua

Miller-Beggerow Fund in honor of Cornelia Chason Miller

The Lewis Miller Memorial Fund

The Walter L. and Martha Tinkham Miller Fund

The Miriam S. Reading/Richard H. Miller Fund

The Helen H. and Paul L. Sample Fund

The Donald Chace Shaw Fund

Tate Family Endowment for Fine and Performing Arts

The Edris and David H. Weis Family Fund

# **OTHER SPECIFIED FUNDS**

\$4,088,823 Net Assets \$150,245 Support to the Institution

Allegheny Jazz Society Fund

John S. and Tracy A. Lafond Barakat Endowment

Jane and Tom Becker Endowment for Amphitheater Programs

Philip J. and Barbara S. Brunskill Fund

Buffalo-Chautauqua Idea and Connection: Galucki Family

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# LYNDALL FAMILY FUND



The Lyndall Family has made giving back a part of their Chautauqua experience for decades. Long before the Lyndall Family Fund was established, Mary worked on grounds. "I grew up in Corry, Pennsylvania near Chautauqua, so I visited often with family and friends. I worked at Smith Library during the summers of 1968 and 1969 and lived on grounds."

Later, in 1980 Dale and Mary began renting for two weeks at Chautauqua with their two children, Sally and Craig, with Mark still a year away. That was just the beginning.

"The next year we rented for four weeks, and then five. We finally bought 27 Ames in 1991, and then our Chautauqua Shores home in 1999. Our children grew up loving summers at Chautauqua. They all attended Children's School and Boys' and Girls' Club. Craig and Mark delivered *The Chautauquan Daily*, Craig worked at The William Baker, and Sally and Mark were Club counselors."

Sally and her husband met and later married at Chautauqua. Mary added, "All of our grandchildren have attended Children's School and Boys' and Girls' Club just like their parents. Lifetime friendships have been made by all of us!"

Three generations of Lyndalls now consider Chautauqua their special place.

Dale knew from the beginning that it takes more than love to sustain a place like Chautauqua. "As we spent more and more time at Chautauqua, we realized the importance of contributing time and money to the Institution for it to continue. Those were limited early on as I was building my business," he said. "We started giving what we could and later joined The Bestor Society. When things continued to improve for us financially, we decided to start the Lyndall Family Fund. That fund has grown, and now our children contribute to it as well."

The Lyndall Family Fund is a permanent endowment fund providing general support to Chautauqua Institution. The Lyndalls understand the importance of unrestricted gifts to the health of Chautauqua. "Just as Chautauqua is a part of our family and sustains us, we hope our family fund will continue to help to sustain Chautauqua."

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| Susan Bosland of Alexandria, Virginia • 3, 6, 7              | 2027              |
| Chair, Personnel Committee                                   |                   |
| Andrew L. Camden of Grosse Pointe, Michigan • 3, 5, 6        | 2025              |
| Chair, Investment Committee                                  |                   |
| Bert Clark of Atlanta, Georgia • 1, 5                        | 2027              |
| Erroll B. Davis Jr. of Atlanta, Georgia • 4                  | 2028              |
| Charles Denton of Brookhaven, Georgia • 1, 6                 | 2028              |
| Michael E. Hill of Washington, D.C. and                      | ii                |
| Chautauqua, New York - ex officio • 3, 4, 5                  | :                 |
| Terrance N. Horner, Jr. of Washington, D.C. • 1, 2           | 2025              |
| Nancy Kyler of Staunton, Virginia • 1, 7                     | 2028              |
| Betsy Bechtolt-Magley of Pittsburgh, Pennsylvania • 2,       | 7 2028            |
| Craig Marthinsen of Toronto, Ontario • 3, 4, 5               | 2026              |
| Anne Odland of West Palm Beach, Florida • 1, 3, 4            | 2026              |
| Chair, Audit Committee                                       | i                 |
| Richard Osborne of Charlotte, North Carolina • 2, 4          | 2025 <sup>'</sup> |
| M. Timothy Renjilian of Atlanta, Georgia • 1, 2, 3, 4, 5, 6, | 7 2027            |
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| Chair, Board of Directors                                    |                   |
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| Sheila Schroeder of London, England • 3, 4, 5                | 2025              |
| Chair, Finance Committee                                     | 00                |
| George T. Snyder of Pittsburgh, Pennsylvania • 1, 3, 7       | 2025              |

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|-------------------------|-----------------------------|
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<sup>&</sup>lt;sup>i</sup> Coincides with term on the Chautauqua Institution's Board of Trustees ii Coincides with term as President of Chautauqua Institution

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Joanna Kaufmann • Corporate Secretary

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Joanna Kaufmann • Corporate Secretary and Planned Gift

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