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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.

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

Statement of Purpose

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

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.

To do all lawful things proper or needful to accomplish the purposes herein before expressed.

Article II, Corporate Charter May 14, 1937

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

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

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

- 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.

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

- 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.

- To do all lawful things proper or needful to accomplish the purposes herein before expressed.
One of the defining features of the Chautauqua Foundation is our steady, ongoing focus on ensuring the long-term sustainability of Chautauqua Institution. Even so, we are entering a year when the Foundation’s mission and vision is particularly resonant. 2024 brings excitement about the 150th Anniversary of Chautauqua Institution; a renewed and refined emphasis on the Institution’s 150 Forward strategic plan; and the public unveiling of Boundless, A Campaign For Chautauqua, with its $150 million goal and a particular focus on the criticality of endowment. We have much to look forward to together!

As we look forward to the events to come, we also take satisfaction in the accomplishments of the past year. In 2023, the Foundation concluded its strategic planning work, adopting three pillars that are central to the mission of the Foundation: Stewardship, Relationships, and Advocacy. The Stewardship pillar reflects the longstanding core of the Foundation’s mission — the preservation, appropriate use, and growth of endowment funds. The other two pillars, Relationships and Advocacy, center on the ways the Foundation can support and partner with the Chautauqua community to enhance and strengthen Chautauqua’s future. These three pillars provide the framework within which we have developed specific goals and objectives to maximize the Foundation’s role in supporting Chautauqua’s success.

**Stewardship**

Stewardship involves managing endowment assets to maximize investment returns while prudently balancing risk. This requires a holistic view of financial management and the role the endowment plays in the Institution’s financial model. In addition to close collaboration with the Institution, this requires expertise in investment management, asset allocation, and risk assessment to achieve optimal performance while safeguarding the endowment’s principal.

Stewardship also involves ensuring adherence to donor intent through careful oversight of the proper use and efficient utilization of individual endowment funds. This calls us to work closely with donors and Institution leadership to verify that funds are used in accordance with the stated objectives of the donors. Stewardship emphasizes the efficient and strategic utilization of endowment funds to maximize impact.
Relationships
The Foundation’s relationships with endowment donors, the broader Chautauqua community, and Institution leadership are critical. Relationships are built on trust, transparency, and shared goals. Among other things, this requires that the Foundation leadership be active and engaged in the life of Chautauqua, contributing to the success of groups, individuals and initiatives that enrich the community; serving as a trusted source of information; and providing a necessary conduit for input and feedback. Such a collaborative approach strengthens relationships, builds trust, and helps ensure alignment of the Foundation’s goals and strategies with those of Chautauqua.

Advocacy
The Foundation seeks to support the long-term success of Chautauqua Institution by actively engaging with the local community and other stakeholders to raise awareness about the Institution’s mission, impact, and financial needs. By actively championing the Institution’s mission and serving as a resource for understanding its operational and financial landscape, the Foundation can help craft compelling narratives and messages that effectively communicate the importance of Chautauqua’s work and its worthiness of support.

In particular, the Foundation must play a key role in articulating the importance of endowment. This involves sharing compelling stories about how endowment funds positively impact the Institution’s success. It also involves helping to create and cast a vision for how an increasingly substantial endowment can help to transform and magnify Chautauqua’s future impact.

2023 was an outstanding year for the Foundation with the highest amount of cash ever received, a significant increase in future commitments, and strong market performance. The pages ahead report on this activity, illustrating key trends and providing our complete financial statements and independent audit report.

2023 highlights include:
- Future commitments to the Foundation increased by nearly $12 million, to a new all-time high of $80 million.
- Our current endowment investment assets hit $130 million, bringing the total existing assets and commitments available for future use at Chautauqua to more than $200 million.
- We distributed $4.5 million in ordinary endowment payout to the Institution, and another $1 million from funds held by the Foundation on behalf of the Institution Board of Trustees.

These achievements were made possible by the generosity of Chautauquans like you and the exceptional work done by the Institution’s Office of Advancement to build the planned giving program over the years.

The level of new gifts received in 2023 demonstrates that Chautauquans recognize that endowment funds provide a stable and enduring source of income, preserving and enhancing the Institution’s operations, grounds, programs, and impact over time. Endowment is the one truly reliable, enduring source of financial stability for Chautauqua Institution. While achieving true, comprehensive financial security for the Institution’s core activities will take many more years like the one just past, it’s reassuring to know that so many in our community recognize the long-term value and importance of Chautauqua’s work.

The Chautauqua Foundation Board of Directors remains committed to financial stewardship, building strong relationships, and advocating in the community to help ensure the Chautauqua we know and love remains vibrant and relevant for generations of future Chautauquans.

Thank you for your generous support!

Sincerely,

[Signature]
Deb E. M.
Financial Overview

The net assets of the Foundation grew by over $18 million in 2023. Cash received for endowment was an all-time high of $9.2 million. After a market correction in 2022, the endowment portfolio rebounded by 12.5%, increasing by $14.2 million. The Foundation made $4.6 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 $61 million from $75 million as of March 31, 2013 to $136 million as of December 31, 2023.
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 803 active endowment funds as of December 31, 2023, by area of support.

Number of Active Endowment Funds

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/31/19</td>
<td>765</td>
</tr>
<tr>
<td>12/31/20</td>
<td>775</td>
</tr>
<tr>
<td>12/31/21</td>
<td>788</td>
</tr>
<tr>
<td>12/31/22</td>
<td>794</td>
</tr>
<tr>
<td>12/31/23</td>
<td>803</td>
</tr>
</tbody>
</table>
Endowment Fundraising Objectives

There are two objectives for endowment fundraising: to receive gifts to be added to the endowment each year and to build a pipeline of endowment gift commitments to be received in future years.

Endowment Cash Received

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

- Realized Planned Gifts
- Pledge 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.

- Unspecified
- Specified
Future Commitments to Endowment

The cumulative amount of future commitments to the Foundation was $80 million as of December 31, 2023, 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 $14.9 million and are recorded in the financial statements at net discounted values of $686,000 for cash pledges and $4.9 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 $65.4 million, which represents bequests, revocable trusts and beneficial interests.

---

Endowment Pledges 1%  <1% Charitable Gift Annuities

Irrevocable Trusts 15%

Pooled Life Income Fund 4%

Revocable Trusts 8%

Beneficial Interests 11%

61% Bequests
Investment Summary

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

Hirtle Callaghan & Co., LLC serves as the Foundation’s Outsourced Chief Investment Officer and actively manages the majority of the endowment portfolio, 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 is managed by Pointer Management, LLC. The portfolio for other restricted funds has a conservative investment strategy primarily held in cash with some investment in bonds. The ESG portfolio is comprised 80% of ESG Equities and 20% US Treasury Fixed Income.

The Investment Committee also has oversight responsibility for the pooled life income fund, which is managed by Key Private Bank. As of December 31, 2023, 47% of the PLIF assets were invested in equities, 47% in fixed income and 6% in real assets.

Endowment Asset Allocation

The main endowment portfolio market value was $129 million as of December 31, 2023, and has a diversified asset allocation.
**Investment Management**

The Investment Committee regularly reviews investment policies, strategy, execution and performance. Because asset allocation is the primary driver of a portfolio's total return over the long run, comparison of performance is viewed in the context of the portfolio's asset class holdings and a composite benchmark that reflects the asset allocation is used to evaluate performance. Investment performance is measured on a net basis, defined as total time weighted return after all investment management fees.

**Endowment Investment Portfolio**

The chart below represents the endowment comprised of the main investment portfolio, the ESG portfolio, and the hedge fund portfolio. The endowment has grown by $99 million, from $30 million as of March 31, 2003 to $129 million as of December 31, 2023.
Annual Endowment Performance

The endowment portfolio grew by 12.5% in 2023. The Investment Committee takes a long-term approach, over full market cycles, to assess the performance of the main endowment portfolio. The benchmark the committee uses to assess performance is net of fees and is diversified based on the strategic allocation of the Russell 3000, MSCI EAFE, HFR Strategic and BarCap Aggregate Bond indices. The benchmark is currently weighted 30% Russell 3000, 30% MSCI EAFE, 20% HFR Strategic and 20% BarCap Aggregate Bond. The portfolio has continuously exceeded the benchmark for 10-year annualized returns.

10-Year Annualized Returns

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<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10-Year Return</td>
<td>6.3%</td>
<td>5.6%</td>
<td>4.3%</td>
<td>3.6%</td>
<td>4.0%</td>
<td>7.2%</td>
<td>6.8%</td>
<td>7.1%</td>
<td>9.0%</td>
<td>5.8%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Benchmark</td>
<td>5.9%</td>
<td>4.9%</td>
<td>4.0%</td>
<td>3.0%</td>
<td>3.7%</td>
<td>6.7%</td>
<td>6.5%</td>
<td>6.7%</td>
<td>8.2%</td>
<td>5.4%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>
Financial Objective of Endowment Investment Program

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

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 more than doubled, from $63 million to $136 million. This chart shows the receipt of $55 million in contributions and net investment income exceeding spending by $18 million, growing the real market value to maintain purchasing power, while also supporting total spending of $53 million over 10 years.

*The Foundation changed its fiscal year end from March to December in 2019.*
The Audit Committee reviewed and discussed the audited financial statements for the year ended December 31, 2023, 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, 2023 and 2022, 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, 2023 and 2022, 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 29, 2024
## Statements of Financial Position

**December 31,**

<table>
<thead>
<tr>
<th>Assets:</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$1,507,692</td>
<td>$468,951</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>685,595</td>
<td>554,319</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>129,356,788</td>
<td>113,209,818</td>
</tr>
<tr>
<td>Split-interest agreements</td>
<td>4,872,505</td>
<td>4,306,883</td>
</tr>
<tr>
<td>Other assets</td>
<td>546,238</td>
<td>582,725</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$136,968,818</td>
<td>$119,122,696</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities and Net Assets:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Liabilities:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due to the Institution (Note 4)</td>
<td>$782,236</td>
<td>$1,099,296</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>107,187</td>
<td>88,800</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>889,423</td>
<td>1,188,096</td>
</tr>
</tbody>
</table>

| Net Assets (Note 5):                 | 136,079,395| 117,934,600|
| Without donor restrictions           | 7,679,359  | 6,358,897  |
| With donor restrictions              | 128,400,036| 111,575,703|
| **Total Net Assets**                 | $136,968,818| $119,122,696|


For the year ended December 31, 2023

<table>
<thead>
<tr>
<th></th>
<th>Net Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Without Donor Restrictions</td>
</tr>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
</tr>
<tr>
<td>Contributions:</td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td>$1,723,843</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
</tr>
<tr>
<td>Change in value of</td>
<td></td>
</tr>
<tr>
<td>split-interest agreements</td>
<td>-</td>
</tr>
<tr>
<td>Investment activity, net</td>
<td>819,930</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td>2,543,773</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
</tr>
<tr>
<td>Program:</td>
<td></td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>4,677,050</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>1,061,811</td>
</tr>
<tr>
<td>General and administrative</td>
<td>758,658</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>6,497,519</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions</strong></td>
<td>5,274,208</td>
</tr>
<tr>
<td><strong>Change in net assets</strong></td>
<td>1,320,462</td>
</tr>
<tr>
<td><strong>Net assets - beginning</strong></td>
<td>6,358,897</td>
</tr>
<tr>
<td><strong>Net assets - ending</strong></td>
<td>$7,679,359</td>
</tr>
</tbody>
</table>
For the year ended December 31, 2022

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Assets</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td>$751,734</td>
<td>$3,630,602</td>
<td>$4,382,336</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>69,683</td>
<td>69,683</td>
</tr>
<tr>
<td><strong>Change in value of</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>split-interest agreements</td>
<td>-</td>
<td>(934,470)</td>
<td>(934,470)</td>
</tr>
<tr>
<td>Investment activity, net</td>
<td>(1,042,411)</td>
<td>(19,594,799)</td>
<td>(20,637,210)</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td>(290,677)</td>
<td>(16,828,984)</td>
<td>(17,119,661)</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>4,423,856</td>
<td>-</td>
<td>4,423,856</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>15,790</td>
<td>-</td>
<td>15,790</td>
</tr>
<tr>
<td>General and administrative</td>
<td>740,439</td>
<td>-</td>
<td>740,439</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>5,180,085</td>
<td>-</td>
<td>5,180,085</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions</strong></td>
<td>4,944,013</td>
<td>(4,944,013)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Change in net assets</strong></td>
<td>(526,749)</td>
<td>(21,772,997)</td>
<td>(22,299,746)</td>
</tr>
<tr>
<td><strong>Net assets - beginning</strong></td>
<td>6,885,646</td>
<td>133,348,700</td>
<td>140,234,346</td>
</tr>
<tr>
<td><strong>Net assets - ending</strong></td>
<td>$6,358,897</td>
<td>$111,575,703</td>
<td>$117,934,600</td>
</tr>
</tbody>
</table>
# Statements of Cash Flows

For the years ended December 31,

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating activities:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td>$18,144,795</td>
<td>$(22,299,746)</td>
</tr>
<tr>
<td>Adjustments to reconcile change in net assets to net cash flows from operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net realized and unrealized (gains) losses on investments</td>
<td>$(12,235,874)</td>
<td>21,334,411</td>
</tr>
<tr>
<td>Changes in other operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>(131,276)</td>
<td>387,361</td>
</tr>
<tr>
<td>Receivable from split-interest agreements</td>
<td>(565,622)</td>
<td>929,470</td>
</tr>
<tr>
<td>Other assets</td>
<td>36,487</td>
<td>(157,206)</td>
</tr>
<tr>
<td>Payable to the Institution</td>
<td>(317,060)</td>
<td>(294,779)</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>18,387</td>
<td>877</td>
</tr>
<tr>
<td><strong>Net operating activities</strong></td>
<td>$4,949,837</td>
<td>(99,612)</td>
</tr>
</tbody>
</table>

| **Investing activities:**                |               |               |
| Purchases of investments                 | (9,546,521)   | (14,653,253)  |
| Proceeds from sales of investments       | 5,635,425     | 13,970,965    |
| **Net investing activities**             | (3,911,096)   | (682,288)     |
| **Net change in cash**                   | 1,038,741     | 781,900       |
| Cash - beginning                         | 468,951       | 1,250,851     |
| **Cash - ending**                        | $1,507,692    | $468,951      |
1. Summary of Significant Accounting Policies:

Organization and Purpose
Chautauqua Foundation, Inc. (the Foundation) was established in 1937. The Foundation exists to support Chautauqua Institution (the Institution) through the preservation, 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 29, 2024, 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 $14,183,000 and $12,786,000 at December 31, 2023 and 2022.

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 $65,360,000 and $55,187,000 at December 31, 2023 and 2022.

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:

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross unconditional promises to give</td>
<td>$714,834</td>
<td>$559,336</td>
</tr>
<tr>
<td>Less unamortized discount</td>
<td>29,239</td>
<td>5,017</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$685,595</strong></td>
<td><strong>$554,319</strong></td>
</tr>
</tbody>
</table>

Contributions receivable at December 31, 2023 are expected to be received over the periods shown below:

<table>
<thead>
<tr>
<th>Period</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>$406,867</td>
</tr>
<tr>
<td>One to five years</td>
<td>307,967</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$714,834</strong></td>
</tr>
</tbody>
</table>

3. Investments:

<table>
<thead>
<tr>
<th></th>
<th>2023 Quoted Prices in Active Markets</th>
<th>2023 Net Asset Value</th>
<th>2023 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money market</td>
<td>$1,907,270</td>
<td>$-</td>
<td>$1,907,270</td>
</tr>
<tr>
<td>Equities</td>
<td>55,164,292</td>
<td>55,164,292</td>
<td>55,164,292</td>
</tr>
<tr>
<td>Fixed income</td>
<td>21,650,735</td>
<td>21,650,735</td>
<td>21,650,735</td>
</tr>
<tr>
<td>Hedge fund</td>
<td>-</td>
<td>11,593,035</td>
<td>11,593,035</td>
</tr>
<tr>
<td>Private equity/credit</td>
<td>-</td>
<td>24,774,229</td>
<td>24,774,229</td>
</tr>
<tr>
<td>Select equity</td>
<td>-</td>
<td>14,267,227</td>
<td>14,267,227</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$78,722,297</strong></td>
<td><strong>$50,634,491</strong></td>
<td><strong>$129,356,788</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2022 Quoted Prices in Active Markets</th>
<th>2022 Net Asset Value</th>
<th>2022 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money market</td>
<td>$869,606</td>
<td>$-</td>
<td>$869,606</td>
</tr>
<tr>
<td>Equities</td>
<td>43,491,672</td>
<td>43,491,672</td>
<td>43,491,672</td>
</tr>
<tr>
<td>Fixed income</td>
<td>20,587,105</td>
<td>20,587,105</td>
<td>20,587,105</td>
</tr>
<tr>
<td>Hedge fund</td>
<td>-</td>
<td>14,379,312</td>
<td>14,379,312</td>
</tr>
<tr>
<td>Private equity/credit</td>
<td>-</td>
<td>22,275,667</td>
<td>22,275,667</td>
</tr>
<tr>
<td>Select equity</td>
<td>-</td>
<td>11,606,456</td>
<td>11,606,456</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$64,948,383</strong></td>
<td><strong>$48,261,435</strong></td>
<td><strong>$113,209,818</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023 Dividends and interest, net</td>
<td>$127,563</td>
<td>$1,836,734</td>
<td>$1,964,297</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>692,367</td>
<td>11,543,507</td>
<td>12,235,874</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$819,930</strong></td>
<td><strong>$13,380,241</strong></td>
<td><strong>$14,200,171</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022 Dividends and interest, net</td>
<td>$54,602</td>
<td>$642,599</td>
<td>$697,201</td>
</tr>
<tr>
<td>Net realized and unrealized losses</td>
<td>(1,097,013)</td>
<td>(20,237,398)</td>
<td>(21,334,411)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>(1,042,411)</strong></td>
<td><strong>(19,594,799)</strong></td>
<td><strong>(20,637,210)</strong></td>
</tr>
</tbody>
</table>

As of December 31, 2023, the Foundation has committed capital of approximately $42,050,000 to private equity investments and the remaining obligation under these commitments totaled approximately $13,988,000.

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

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redemption frequency:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily</td>
<td>$78,722,297</td>
<td>$64,948,383</td>
</tr>
<tr>
<td>Quarterly</td>
<td>14,267,227</td>
<td>11,606,456</td>
</tr>
<tr>
<td>Semi-annually</td>
<td>11,593,035</td>
<td>14,379,312</td>
</tr>
<tr>
<td>Nonredeemable</td>
<td>24,774,229</td>
<td>22,275,667</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$129,356,788</td>
<td>$113,209,818</td>
</tr>
</tbody>
</table>

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, 2023, 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 consists of appropriations from donor restricted endowment funds where the underlying restriction has been met and for purposes approved by the Foundation’s Board. Total amounts distributed were $5,587,583 and $4,366,022 for the years ended December 31, 2023 and 2022, respectively. Amounts appropriated where the underlying restriction has not been met remain due to the Institution, which totaled $782,236 and $1,099,296 at December 31, 2023 and 2022, 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 $93,240 and $72,410 at December 31, 2023 and 2022, respectively.

For the years ended December 31, 2023 and 2022, the Foundation agreed to reimburse the Institution in the amount of $250,000 for certain administrative costs incurred on behalf of the Foundation.

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

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

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board-designated endowments</td>
<td>$7,679,359</td>
<td>$5,426,178</td>
</tr>
<tr>
<td>Unrestricted gifts</td>
<td>-</td>
<td>932,719</td>
</tr>
<tr>
<td></td>
<td>$7,679,359</td>
<td>$6,358,897</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$19,690,012</td>
<td>$13,238,434</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>5,704,039</td>
<td>3,523,898</td>
</tr>
<tr>
<td>Board - designated endowments</td>
<td>546,227</td>
<td>466,383</td>
</tr>
<tr>
<td>Other restricted gifts</td>
<td>275,135</td>
<td>349,558</td>
</tr>
<tr>
<td></td>
<td>$26,215,413</td>
<td>$17,578,273</td>
</tr>
</tbody>
</table>

Net assets with donor restrictions that represent the accumulated principal of endowment gifts that have been restricted by donors to be maintained by the Foundation in perpetuity are comprised of the following endowment gift categories at December 31:

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$76,564,321</td>
<td>$69,677,551</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>25,620,302</td>
<td>24,319,879</td>
</tr>
<tr>
<td></td>
<td>$102,184,623</td>
<td>$93,997,430</td>
</tr>
</tbody>
</table>

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 $21,000 and $23,000 for the years ended December 31, 2023 and 2022.
7. Financial Assets Available for Operating Purposes:
The Foundation obtains financial assets primarily through contributions and investment income. The financial assets are acquired throughout the year to help meet the Foundation’s cash needs to provide support to the Institution and for general expenditures in accordance with the Foundation’s spending policy.

8. Endowment Assets:
The Foundation’s endowment assets are comprised of board-designated endowments and donor restricted endowments to be held in perpetuity. 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:

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Board-Designated</td>
<td>Perpetual Endowment</td>
</tr>
<tr>
<td><strong>2023</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment assets – beginning of year</td>
<td>$5,426,178</td>
<td>$466,383</td>
</tr>
<tr>
<td>Contributions</td>
<td>1,723,843</td>
<td>42,999</td>
</tr>
<tr>
<td>Other adjustments</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(265,170)</td>
<td>(22,792)</td>
</tr>
<tr>
<td>Endowment assets – end of year</td>
<td>$7,679,359</td>
<td>$546,227</td>
</tr>
<tr>
<td><strong>2022</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment assets – beginning of year</td>
<td>$5,860,050</td>
<td>$552,361</td>
</tr>
<tr>
<td>Investment activity</td>
<td>(955,643)</td>
<td>(87,357)</td>
</tr>
<tr>
<td>Contributions</td>
<td>765,144</td>
<td>10,000</td>
</tr>
<tr>
<td>Other adjustments</td>
<td>(13,410)</td>
<td>13,410</td>
</tr>
<tr>
<td>Appropriated</td>
<td>(229,963)</td>
<td>(22,031)</td>
</tr>
<tr>
<td>Endowment assets – end of year</td>
<td>$5,426,178</td>
<td>$466,383</td>
</tr>
</tbody>
</table>
9. Expenses by Nature and Function:

<table>
<thead>
<tr>
<th>Year</th>
<th>Program</th>
<th>General and Administrative</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>$4,677,050</td>
<td>$0</td>
<td>$4,677,050</td>
</tr>
<tr>
<td></td>
<td>1,061,811</td>
<td>$0</td>
<td>1,061,811</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>354,429</td>
<td>354,429</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>250,000</td>
<td>250,000</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>50,954</td>
<td>50,954</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>73,347</td>
<td>73,347</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>29,928</td>
<td>29,928</td>
</tr>
<tr>
<td></td>
<td>$5,738,861</td>
<td>$758,658</td>
<td>$6,497,519</td>
</tr>
<tr>
<td>2022</td>
<td>$4,423,856</td>
<td>$0</td>
<td>$4,423,856</td>
</tr>
<tr>
<td></td>
<td>15,790</td>
<td>$0</td>
<td>15,790</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>340,357</td>
<td>340,357</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>250,000</td>
<td>250,000</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>43,113</td>
<td>43,113</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>83,264</td>
<td>83,264</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>23,705</td>
<td>23,705</td>
</tr>
<tr>
<td></td>
<td>$4,439,646</td>
<td>$740,439</td>
<td>$5,180,085</td>
</tr>
</tbody>
</table>

The financial statements report certain categories of expenses that are attributable to program and supporting functions, which are directly charged to the functions benefited.
To get a sense of Kay Logan’s enduring impact on Chautauqua’s Summer Assembly, one only needs to open their eyes and perk up their ears. A stroll around the grounds, particularly the North End, is incomplete without those most sensory reminders of her legacy: the vibrant mural of the Chautauqua Symphony Orchestra that still hangs over her former home at Prospect and Pratt; lively conversation from the porch of the Logan Dormitory, which brings musicians face-to-face with their news-oriented downstairs neighbors; riffs and runs from rehearsing Music School Festival Orchestra students (especially the flutists); inspired audiences departing chamber music performances in Lenna Hall.

That such experiences, sights and sounds are continued reminders of Kay’s legacy is fitting: music and education shaped her own Chautauqua experience. First coming to Chautauqua as a flute student on scholarship, Logan went on to become a professional musician, educator and author.

And after marrying Harry Logan, the president of United Refining Company, she made the Institution her second home. Never forgetting the impact Chautauqua had on her career, she became a major donor to the Institution throughout her lifetime.

“Kay was not one for endowing things,” remembers Marty Merkley, former Chautauqua Institution Vice President for Performing and Visual Arts and current President of the Kay Hardesty Logan Foundation. “She wrote checks every year for many projects and programs, but she did not endow any... she was not much of a brick-and-mortar person, she was more of a program funder.”

Merkley and Logan became close friends through their respective tenures at Chautauqua, first meeting when Logan served on the committee that interviewed and selected Merkley for his role. Though Kay carried a formidable reputation at Chautauqua, she and Merkley became fast friends, developing and maintaining their relationship until her death in 2016. And when the time came to establish a charitable foundation to continue her legacy of giving, Logan asked Merkley to serve as its president.

After Kay died, Merkley and his fellow foundation trustees had a conversation about how to best carry on her legacy of giving. Despite Kay’s preference for annual contributions, they determined that endowing certain programs would ensure their continuity in perpetuity.

“We had to decide which things were going to continue, and which things would go by the wayside,” says Merkley. “It made sense to endow those programs that were most important to her. Otherwise, they might possibly end. So that has been the goal over the last eight years: endowing various programs to which she was committed.”
And that generosity has extended to Chautauqua across several programs, including a $1 million gift to endow chamber music at Chautauqua and, in 2023, a $250,000 gift to endow the David Effron Conducting Fellowship. The gift for the Effron Fellowship was especially meaningful.

“Kay decided that it’d be great if Chautauqua had a conducting fellow to study with MSFO Director Timothy Muffitt because she liked Tim a lot,” says Merkley. “She admired his work, attitude, teaching and musicality. She went to Timothy and said, ‘how would you feel about having a conducting fellow every year?’ So, they worked the program out and then she said, ‘I’ll fund it.’”

Muffitt had studied with renowned conductor David Effron, who had served as the director of Chautauqua’s School of Music. Logan, who never named anything after herself, was also a fan of Effron’s work. So, when Muffitt suggested they name the fellowship in Effron’s honor, Kay happily agreed.

More than two dozen conductors have held the fellowship and their careers have taken them to the farthest corners of the world. Former Effron Fellows now conduct orchestras in Boston, Chicago, Calgary, Hong Kong, Jakarta and New York City (for the Metropolitan Opera). And thanks to the gift of the Kay Hardesty Logan Foundation, many more emerging maestros will have the opportunity to study under the same roofs and trees from which Logan honed her own musical skills.

Merkley recognizes that endowment was not Logan’s preferred avenue of giving, but he is confident she’d endorse the Foundation’s gifts. And though Logan didn’t like to name programs and projects after herself, he’s glad to immortalize her now. But the impact extends far beyond honorary naming.

“People forget that we go through a cycle of life: we leave and there’s a whole group coming after us who have no idea who we are or what we did. There is nothing to remind them, ‘I was here, and I did good things,’” he says. “You’ve got to look at it altruistically: ‘I want this to continue, so I need to support it so it can excel and meet the challenges of the future.’ You want to be remembered as having been part of this and leave something tangible behind.”

Fortunately for us, Kay’s legacy extends far beyond her family and close circle of friends, to make all Chautauquans’ lives a bit brighter.
ENDOWMENT FUNDS

UNSPECIFIED FUNDS
Provide general support to Chautauqua Institution

$35,501,916  Net Assets
$1,281,387  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 Chautauqua
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 Chautauqua
Elizabeth Danielson Fund
Charles and Rebecca Denton Endowment for Chautauqua
Dietrich Family Endowment at Chautauqua
Martha T. and Morgan O. Doolittle Fund
Lora Lee and Bob Duncan Endowment
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 Chautauqua
Gelb Family Endowment for Chautauqua
William R. and Betsy Callicott Goodell Endowment
Kathleen M. and Donald C. Greenhouse Endowment for Chautauqua
Jean Edgcumbe Groff Endowment for Chautauqua
Groninger Family Fund
Habenicht Family Fund
Felicia Grace Hall Fund
Tirzah H. Hall Fund
Sarah R. Hankey Fund for Chautauqua
Diana and Samuel Harbison Endowment
Walter O. and Joan S. Harf Fund
W. Murray and Pegi M. Hamner Endowment for Chautauqua
Heber R. Harper Fund
Drs. Thomas J. and Patricia H. Hasbach Endowment for Chautauqua
Eleanor McKnight Haupt Endowment for Chautauqua
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
Margaret C. Mercer Endowment
Richard H. Miller Fund
Dawson E. and Charlotte B. Molyneaux Endowment
Jane C. Morgan Fund
Lewis W. & Katherine C. Morgan Fund
James R. Morris III Fund
The George E. and Susan Moran Murphy Family Fund
Orlov Family Fund for Chautauqua
Robert B. and June A. Osburn Fund
Robert Pace Endowment Fund
Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
Mary C. and William H. Park Fund
Mary Lou Cady Parlato Endowment for Chautauqua
Charles E. and Gladys W. Peirce Fund
Donald R. Pembridge and Rosalie H. Pembridge Endowment for Chautauqua
Margaret Penn Fund
Sheila Penrose and Ernest Mahaffey Endowment for Chautauqua
Steven W. and Barbara P. Percy Endowment for Chautauqua
Helen Pickup-Hyman Fund
Mary Ellen Pindyck Fund
Sam and Petey Tinkham Price Family Fund
Evelyn Joyce Ramsdell Fund
Mary Oram Reading Fund
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 Chautauqua
Mary Jo Walton Schweizer Endowment for Chautauqua
Jo and Bill Selnick Fund
Emma O. and H. Parker Sharp Fund
Jane R. and Walter C. Shaw, Jr. Fund
Ralph C. Sheldon, Jr. Fund
Allen and Elaine Short Endowment for Chautauqua
Bert W. and Joanne R. Simons Endowment
Elizabeth M. Smith Memorial Endowment for Chautauqua
J. Vance Smith and Robert M. Smith Fund
George T. and Margaret D. Snyder Endowment for Chautauqua
ENDOWMENT FUNDS

Nancy Coburn Snyder Endowment Fund
Thomas H. and Joan Stevens Family Endowment for Chautauqua
Betty P. and J. Bruce Stromgren Fund
Ann H. and Daniel F. Sullivan Endowment for Chautauqua
The Robert C. and Patricia D. Switzer Family Fund
Tate Family Fund
Eleanor M. Thomas Fund
The Susan and John Turben Foundation Endowment for Chautauqua
Joseph & Elizabeth Verlie Endowment
Carl A. and Mary Louise Viehe Family Endowment
Debby and Dick Wade Endowment for Chautauqua
Nina and Norman Wain Family Endowment for Chautauqua
Carolyn and Bill Ward Endowment for Chautauqua
Evelyn Wargo Endowment
Charles and Lois Weaver Fund
Nina T. Wensley Fund
Helen N. White Fund
Robert O. Wilder Family Fund
Jack A. and Muriel Winter Endowment Fund
Jack R. Winter Fund
Michael Winter Fund
Betty Offutt Wood and BRAVAS Endowment for Chautauqua
Henry L. Wood Fund
John B. Yoder Endowment for Chautauqua
Robert and Virginia Young
The Deborah and Allen Zaretsky Fund
Stephen J. Zenczak and Patricia E. Feighan Endowment for Chautauqua
General Endowment Fund
SPECIFIED FUNDS
Provide support to Chautauqua Institution in accordance with the specific purpose designated by the donor
$94,308,874  Net Assets
$3,395,663  Support to the Institution

PHYSICAL MAINTENANCE FUNDS
$18,239,606  Net Assets
$693,410  Support to the Institution

Buildings and Structures
$15,768,743  Net Assets
$597,386  Support to the Institution

Amphitheater Endowment Fund
Jack G. and Elizabeth L. Armstrong Fund for Youth Facilities
Bellinger Hall Maintenance Endowment
The Francis and Susan Bonsignore Youth Facilities Fund
Bratton Theater Endowment Fund
Carnahan-Jackson Endowment for Dance Studio Maintenance
Chautauqua Opera Guild Endowment for Connolly Residence Hall
Children’s School Fund
The CLSC Class of 2000 Mosaic Fund
Mary E. Collier Memorial Fund
Connolly Residence Hall Endowment
Coyle Pavilion Fund
Crowder Family Youth Endowment Fund
Department of Religion Physical Facilities Fund
Mina Miller Edison Fund
The Dorothy J. Forney Memorial Fund
Fowler-Kellogg Art Center Endowment
The Joseph and Anna Gartner Foundation Endowment for Bonnefoux-McBride Hall

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
$1,793,451  Net Assets
$69,768  Support to the Institution

Reid B. Babcox Memorial Garden Terrace Endowment
The Bell/Ritts Garden Fund
Arlene and Ralph Bernstein Memorial Rain Garden Fund
ENDOWMENT FUNDS

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

General Grounds and Gardens
$677,412  Net Assets
$26,257  Support to the Institution

EDUCATION & YOUTH FUNDS

$21,589,017  Net Assets
$649,324  Support to the Institution

Lectureships
$12,393,446  Net Assets
$457,611  Support to the Institution

10:45 Lecture Platform Endowment
Malcolm Anderson Lecture Fund
The Sondra R. and R. Quintus Anderson Lectureship
Helen S. and Merrill L. Bank Lectureship
David and Wendy Barenfeld Lectureship Fund
The Crawford N. and May Sellstrom Bargar Lectureship in Business and Economics
Robert S. Bargar Memorial Lectureship
The Arnold and Jill Bellowe Lectureship
Berglund-Weiss Lectureship Fund
June and Albert Bonyor Lectureship Fund
Dr. Edwin Prince Booth Memorial Lectureship Fund
The Boyle Family Lectureship Fund
Selina and Walter Braham Lectureship
The Richard Newman Campen "Chautauqua Impressions" Fund
Carnahan-Jackson Lectureship
Chautauqua Fellows Fund
William and Julia Clinger Lectureship
Beverly and Bruce Conner Endowment for Education
The Joseph H. DeFrees Memorial Lecture
The Edith B. and Arthur E. Earley Lectureship
The Eleanor Fund Lectureship Endowment
The Foglesong Family Lectureship Fund
The Charles and Gail Gamble Lecture Endowment
Barbara A. Georgescu Lectureship Endowment
The Charles Ellsworth Goodell Lectureship in Government and Public Affairs
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 Chautauqua
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**

$2,080,544  Net Assets
$76,912  Support to the Institution

The Baird-Fuller Memorial Fund
Caroline Roberts Barnum and Julianne Barnum Follansbee Fund
Stephen and Edith Benson CLSC Endowment
The Alice M. Bentley CLSC Memorial Fund
John H. Bliss Memorial Fund
Lowell & Frances Hyams Brentano Library Fund
Chautauqua Literary Arts Endowment
Chautauqua Prize Endowment Fund
CLSC Banner Endowment Fund
C.L.S.C. Class of 1940 Endowment Fund
C.L.S.C. Class of 1948 Endowment Fund
The Louise Shaw Van Kirk Dill Fund
The Paul and Mary Jean Irion Endowment
The Mary Anne and John Morefield Endowment for the Enhancement of Poetry
The Bess Sheppard Morrison CLSC Fund
William A. Morrow Fund
Gail Anne Clement Olson Fund
The Martha and Scott Reading Fund
Grace Tongren Ross Fund for Smith Memorial Library
Michael I. Rudell Director of the Literary Arts
W. Jeffrey Simpson Literary Arts Endowment
Smith Memorial Library Fund
Sony Ton-Aime Literary Arts Endowment
Andrew Camden of Grosse Pointe, Michigan, has served on the board of the Chautauqua Foundation since 2001 and is chair of the investment committee. As he puts it, he “married into Chautauqua.” His wife, Gayle Shaw Camden, who passed away in June 2023, came from a family with long ties to the Institution.

“She agreed to marry me,” Andrew says with a smile, “because I adapted to Chautauqua very willingly.” The Camdens ongoing stewardship and support of Chautauqua stand as powerful examples of the way family legacies can have a multifaceted impact on the Institution over time.

Gayle’s parents, Walter Carlyle Shaw Jr. and Jane Robb Shaw Hirsh spent summers with their children at Chautauqua beginning in 1948 when Gayle was a toddler. The Shaws first came to the grounds as guests of Walter’s cousin, Paul Sample. Both the Shaw and Sample families shared mutual business interests and a profound love of the Institution.

Paul and Helen Sample had four daughters (Gayle Camden’s cousins). Miriam Reading, Dorothy Hill, Tilda Klaus, and Becky Habenicht, all of whom have played active roles in the Chautauqua community and have held many leadership positions. Dorothy and Miriam served as Institution Trustees, and Miriam was also a campaign chair, a member of the Foundation Board and chaired the committee that selected Bob Hesse to be Chautauqua’s 14th President. This precedent of service to Chautauqua among women and men was passed along, generation after generation, creating a strong fabric of institutional leadership across families, woven together by a strong commitment to Chautauqua’s mission to explore the best in human values and the enrichment of life. The impact of their various gifts has been felt across all four pillars of Chautauqua’s programming.

Gayle’s father (Walter Shaw, Jr.) retired early in his career, and at the age of 57, turned his considerable energies and leadership skills toward Chautauqua. As Andrew Camden explains, “My father-in-law was chair of the Institution board for six years and continued on the board beyond that. He was still driving up to Chautauqua for meetings in his seventies.”
When Walter Shaw Jr. passed away in 1989, Gayle and Andrew asked the Foundation staff to come up with some ideas for an endowment fund that would contribute to an annual operating need to honor her father, who had always made a large annual gift to the Chautauqua Fund. The result is the Walter C. Shaw Jr. Family Tree Fund, an endowment to which the Camdens and many of their friends have contributed. The annual proceeds from this fund go toward the protection and maintenance of Chautauqua’s tree canopy, a critical community asset that contributes to water quality and the maintenance of shade across the grounds. Protecting Chautauqua’s trees was a good fit with Shaw’s priorities.

Back in 1949, Walter Shaw Jr. had planted many of the now-mature trees surrounding their house which later became the president’s home and today belongs to the Lowell K. Strohl family, another Chautauqua leader. Family interest in maintaining the health of Chautauqua’s delicate ecosystems also extends to Caroline Van Kirk Bissell, also a granddaughter of Walter C. Shaw Sr., who spent 18 seasons educating and delighting Chautauquans with her knowledge of the bat population on the grounds. Caroline has designated a portion of her estate to Chautauqua Foundation to establish an endowment fund for the care and maintenance of trees on the grounds, and programs that encourage environmental protection.

For her part, Gayle’s mother, Jane Robb Shaw Hirsh, established an endowment that can be applied to a different purpose each season as needed — often in support of musical events. A portion of Andrew and Gayle’s substantial bequest is directed to the Edmond E. Robb-Walter C. Shaw Endowment Fund that supports a chaplaincy as well as the Tree Fund. In addition, Andrew has most recently made the initial gift to jumpstart the fundraising for the Chautauqua Theatre Company’s new facility “Over the years Gayle and I have been big fans of the Chautauqua Theater Company,” he says.

Andrew Camden revels in his work as a part of this extraordinary legacy of intertwined family gifts. He also proudly remembers his wife’s talent for creating interior spaces. Their homes at Chautauqua and in Grosse Pointe reflect Gayle’s keen eye as an interior designer and the joy of their extensive travels. Over the course of their marriage, the Camdens collected textiles, sculptures, paintings, and other items that reflect the native cultures of the 70 countries they visited. “She was able to pull things together in a way that nobody else would expect,” Andrew says with delight.

Having spent his career as a financial advisor to high net worth, multigenerational families, Andrew sees his present mission as continuing the stewardship of Gayle’s family and his own. “I am keeping the tradition alive,” he says, “and enjoying the life and environments that Gayle created for us.”
ENDOWMENT FUNDS

Youth Activities
$751,070  Net Assets
$29,425  Support to the Institution
Ward T. Bower Youth Activities Memorial
Elizabeth Elser Doolittle Endowment Fund for Youth
The Gelb Family Endowment Fund
Gelb Family Fund
Cyril T. M. Hough and Lt. C. Randall Hough, USMC Memorial Fund
The Katie Howard Memorial Fund
Julius A. and Carol L. Nicolai Boys’ and Girls’ Club Endowment
The Popp Family Fund
Paul L. Sample Memorial Fund
Andrew and Donna Sorensen Youth Activities Center Endowment
James R. and Alison T. Steadman Boys’ and Girls’ Club Endowment
The Laurence and Maria Wagner Family Fund
Youth Activities Fund

Other
$6,363,957  Net Assets
$85,375  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

PERFORMING & VISUAL ARTS FUNDS
$25,581,955  Net Assets
$944,731  Support to the Institution

General
$4,714,023  Net Assets
$183,667  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
$4,908,132  Net Assets
$191,332  Support to the Institution

The A. Chace & Josephine B. Anderson Opera Endowment Fund
John E. Anderson Opera Endowment
The Peggy and Andy Anderson Family Fund for Opera
The Cynthia Auerbach Fund for Opera
Bemus Endowment for Opera
Anne and John Burden Opera Fund
Chautauqua Opera Endowment Fund
The Chautauqua Opera Guild Endowment
Thomas and Kathleen Clingan Fund for Opera
The Connolly Family Fund For Opera
The John A. and Emily McKnight Corry Opera Fund
The Barbara Baldwin DeFrees Opera Fund
The Walter F. Ferchen Opera Fund
The Eleanor B. Franks Fund for the Opera
The James and Elisabeth Groninger Fund for Opera
The Jane A. Gross Opera Endowment
The Kay Frantz Israel Fund for Opera
The Mildred Lesenger Fund for Opera
The Kay H. Logan Opera Fund
The Annette Pickens Malvin Memorial Fund for Opera
The Christopher and Susan Martin Opera Fund
The Margaret Clark Mercer Fund for Opera
The Ralph E. Miller and Paul E. Cawein Fund for Opera
The Steve Z. and Mary G. Mitchell Family Fund 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**

$5,746,407  Net Assets
$216,466  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 Chautauqua Symphony Orchestra Fund
The William M. Kinley Fund for the Chautauqua Symphony Orchestra
William D. Kuhns Fund for General Music Purposes of Chautauqua Institution
Robert and Susan Laubach Endowment
The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra
Kathryn A. and David B. Levy Fund for the Chautauqua Symphony Orchestra
Helen T. Logan Fund for the Chautauqua Symphony Orchestra
**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 Chautauqua Symphony Orchestra
The Reinberger Fund for the Performing Arts
The Gertrude Aldredge Shelburne Fund
Dan and Linda Silverberg Chautauqua Symphony Orchestra Endowment
The Dr. James and Mary Anne Evans Singleton Fund for the Chautauqua Symphony Orchestra
Symphony Patron Endowment Fund for the Chautauqua Symphony Orchestra
The Trustees’ Fund for the Chautauqua Symphony Orchestra
Rita and Dunbar VanDerveer Symphony Principal Chair for Flute
Katherine Baldridge Warman and Guy L. Warman Chautauqua Symphony Orchestra Fund
Mary E. Whitaker Symphony Endowment Fund
The Wilder Family Fund for the Chautauqua Symphony Orchestra
Nora J. Williams Symphony Fund
Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra

**Theater**

$1,744,467  Net Assets
$68,222  Support to the Institution
The Arnold and Jill Bellowe Fund for Theater
The Nancy E. Brewer Fund for Theater
Chautauqua Theater Fund
Court Family Endowment
The Crockett Family Fund for Theater
The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming
Terrie Vaile Hauck Theater Endowment
The Joel and Barbara Jacob and M. Jacob and Sons Fund for Theater
Helen Moe Fund for Theater
The Florence and Cynthia Norton Fund for Theater
The Phoebe Wagner Ott Theater Fund
Irene and David Tabish Endowment for Theater
ENDOWMENT FUNDS

Dance
$2,873,589  Net Assets
$70,670  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
Chautauqua 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
$3,117,812  Net Assets
$117,393  Support to the Institution
Je'Anne Griffin Bargar Endowment for Visual Arts
The Chautauqua Art Association, Inc. Visual Arts Fund
Shirley Mix Flynn Visual Arts Endowment
Chip and Gail Gamble Visual Arts Endowment
Joan and David Lincoln Ceramics Endowment
Florence H. Norton and Cynthia Norton Visual Arts Endowment
Leon and Gloria Plevin Family Museum Director Lecture Fund
Sydelle Sonkin and Herb Siegel Artistic Director of the Visual Arts
Susan and John Turben Director of the VACI Galleries Endowment

OTHER
$2,477,525  Net Assets
$96,981  Support to the Institution
Shirley A. and Arthur R. Duffy Endowment for Classical Guitar
Kay Hardesty Logan Fund
Heintzelman Family Piano Fund
Anne Capper McIntosh and Walter Stevenson McIntosh Endowment for Voice

RELIGION FUNDS
$8,164,572  Net Assets
$316,410  Support to the Institution

General
$1,953,535  Net Assets
$76,517  Support to the Institution
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  Daniel and Pam Wissel
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  Henry L. Wood Unitrust
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  Mr. and Mrs. Jack A. Winter
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  Mr. Michael Winter
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Nancy Gay Bargar
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Steve and Kathie Barge
Kathleen Barksdale
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  Cynthia C. and Terry R. White
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  Sally L. Wissel
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Dolores F. Parlato
James S. Patton
Joe and Susan Patton
Mike and Judy Patton
Rita E. Paul
Pete and Sarah Pedersen
David R. and Cynthia V. Pelton
Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
William J. Peterson
Pfizer Foundation Matching Gifts Program
Ellis L. Phillips Foundation
Pittsburgh National Bank
Robert and Anne Plyler
Rev. Larry and Linda Poelma
Jeannette A. Polley
Judith Posner
Christine O. Potts
Presbyterian Foundation
Anne S. Prussing
Mary H. Prussing
Rosemary Rappole and Diane Randolph
Imam Feisal Abdul Rauf and Daisy Khan
The Reed Family
Isabelle R. Reed
Mr. and Mrs. Christopher Reid
Hollister Reid and A. Quentin Orza, II
Lois J. Reid
Sherry Reid
Agnes H. Reigart
Pamela Petre Reis
Mr. and Mrs. Jack D. Rice
Jay and Marilyn Richey
Kathleen M. Riley
The Rockefeller Foundation
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William D. Rogers
Stephanie R. Rosenblatt
Daniel Rosenthal and Avery Sheffield
Eithne Ross
James and Maureen Rovegno
Dr. David and Susan Rubin
David Sachs and Linda Shackelford
Ann Salsbury
Ralph and Gretchen Sather
Marilyn Scamman
Phyllis Schultz and Matt Gromet
Helene J. Schwartz
Elizabeth R. Scully
Ms. Mary Seifert
Nikki and Brian Selden
Mr. and Mrs. Donald W. Sharp
Elaine and Allen Short
Betty and Alan Siegel
Gail and Peter Silberstein
Joanne and Bert Simons
Tom and Penny Small
Ellen Smith
Dr. Robert G. and Katy T. Smith
Timothy and Jenny Smucker
Joreta and Richard L. Speck
Clyde Speer
Evangeline McKnight Speer
Marcia Steel
Lois A. Steere
Diane and Jeff Steinhilber Fund
Joan Stevens
Jana Stone
Vern Swaback
Mr. Howard Talks and Ms. Carol Hall
Mr. and Mrs. Frank E. Taplin, Jr.
Sue and Gary Tebor
Martha M. Teich
Brenda and Larry Thompson
Caroline Thompson and Steve Allen
Harold and Jean Thurston
Tiger Management L.L.C.
Dorothy Trefts and Daniel J. McEvoy
TRW, Inc.
The Turbessi Caleca Family
Dr. Carl A. and Mary L. Viehe
Carol and Stephen Viehe
Larry and Maria Wagner
Robert L. Walker
Kitty Baldridge Warman
Kuniko Washio and William Scollard
Dr. Nicholas A. and Carol N. Weil
Florence Mina Miller Weiler
Drs. Jennifer and Robert Weisenthal
Claude Welch
Bill and Betty Whitaker
Elizabeth Ann Wick
John B. Wilbur III and Margaret G. Wilbur
Rachel Wilder and Phil Lerman
Norma K. and Allan P. Wilson
Jean Wilson
Mrs. Lou Wineman
Ann P. Winkelstein
Meryl, Chuck, Andrew and Ian Witmer
Mr. and Mrs. Howard Zemsky
Burt and Sandi Zucker
Philanthropic Fund
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Former Directors and Terms of Service

Wilson C. Price • May 1937 to August 1962
Mrs. E.J. Bellinger • August 1937 to October 1963
Mrs. L. D. Boal • August 1937 to August 1955
Samuel M. Hazlett • August 1937 to July 1956
James H. Matthews • August 1937 to 1939
Walter Roberts • August 1937 to March 1959
David L. Starr • August 1937 to 1951
Mrs. Livingston Hunter • August 1939 to 1942
Mrs. Dorothy Smith • August 1943 to 1950
Walter F. Rittman • August 1950 to September 1954
Harold F. Reed • August 1951 to August 1971
Mrs. Walter F. Rittman • August 1955 to January 1964
Paul N. Anderson • August 1955 to August 1965
Walter C. Shaw, Jr. • August 1956 to August 1974
John D. Hamilton • July 1959 to August 1971
Samuel P. Price, Sr. • August 1962 to August 1995
Mrs. Dorothy W. Cook • August 1964 to August 1987
Lewis W. Morgan • August 1964 to August 1990
Nancy Miller Arnn • August 1965 to August 1989
Richard H. Miller • August 1971 to August 1996
J. Donald Patton • August 1971 to August 1984
Howard G. Gibbs • August 1974 to August 1990
Oscar E. Remick • September 1975 to December 1976
Robert S. Bargar • August 1976 to August 1994
Mrs. Mary B. McDowell • August 1976 to August 1982
John S. Rogers • August 1976 to August 1986
David H. Carnahan • August 1976 to January 2000
George L. Cornell • August 1976 to August 2001
Joseph A. Neubauer • August 1977 to November 1983
Robert R. Hesse • January 1978 to November 1983
Richard L. Bechtolt • August 1982 to July 2006
Daniel L. Bratton • August 1984 to December 2000
Edward P. Boyle • August 1984 to August 1994
Frank E. McElree, Jr. • August 1984 to August 1996
H. David Faust • August 1986 to June 1988
Mary Frances Cram • August 1987 to August 1993
Robert B. Osburn • August 1989 to August 1996
Harold F. Reed, Jr. • August 1989 to August 2001
Eugene S. Cohen • August 1990 to August 1998
George L. Follansbee, Jr. • August 1990 to March 2004
Hal A. Fausnaugh • April 1990 to August 1994
R. Quintus Anderson • April 1991 to August 1995
William F. Hill, II • April 1991 to August 2005
Patricia Goldman • August 1992 to August 2003
Marilyn G. Levinson • August 1992 to August 2000
William H. Park • August 1993 to August 2005
William R. Goodell • August 1994 to August 2019
James G. Groninger • August 1994 to August 2014
William G. Karslake • August 1994 to August 1995
Thomas R. Bromeley • August 1995 to June 2001
vic gelb • August 1995 to August 2011
Selina P. Johnson • August 1996 to August 2008
Former Board Leadership

Wilfred R. Konneker • January 1996 to August 2006
Lowell K. Strohl • August 1996 to February 2010
Miriam S. Reading • January 1997 to August 2006
Susan Moran Murphy • August 1998 to August 2018
Martin Coyle • August 2000 to November 2003
Wendy Cohen • August 2001 to May 2011
Scott McVay • January 2001 to December 2003
Allen Short • August 2001 to August 2005
Karen Goodell • August 2001 to August 2021
John S. Connolly, Jr. • August 2003 to August 2018
Fred C. Gregory • August 2004 to August 2008
Thomas M. Becker • January 2005 to December 2016
Christopher H. Lytle • February 2005 to August 2014
John W. Burden, III • August 2005 to October 2007
Kathryn J. Lincoln • August 2005 to December 2011
I. Hale Oliver • August 2005 to August 2013
George T. Snyder • August 2006 to August 2007

Lauren Rich Fine • August 2006 to August 2020
Steven W. Percy • August 2007 to August 2015
Stephen J. Zenczak • August 2007 to August 2023
John A. Corry • January 2008 to August 2013
Charlotte A. Fowler • August 2008 to December 2012
John E. Anderson • August 2008 to August 2016
Gary M. Brost • May 2010 to August 2016
Thomas B. Hagen • June 2011 to August 2017
John Haughton • August 2017 to November 2022
John S. Kobacker • August 2011 to September 2016
Laura P. Currie • June 2012 to August 2017
Cathy L. Bonner • August 2013 to August 2019
William James • August 2013 to August 2020
P. James Brady • August 2015 to August 2016
Georgia M. Court • August 2016 to October 2017
John A. Milos • August 2016 to August 2019
Richard Wade • August 2016 to August 2020

Former Board Leadership

Walter Roberts
August 1937 to August 1957

John D. Hamilton
August 1967 to August 1971

William F. Hill, II
August 1996 to August 2002

Steven W. Percy
August 2008 to August 2015

Harold F. Reed
August 1957 to August 1967

Richard H. Miller
August 1971 to August 1996

Lowell K. Strohl
August 2002 to August 2008

Cathy L. Bonner
August 2015 to August 2019
OFFICERS, DIRECTORS AND STAFF

Directors

Brett Altman of Wyndmoor, Pennsylvania • 1, 4
David W. Anderson of Hingham, Massachusetts • 2, 3, 5, 6
   Chair, Nominating & Governance Committee
Stacey Berger of New Orleans, Louisiana • 2, 5
Susan Bosland of Alexandria, Virginia • 6, 7
Andrew L. Camden of Grosse Pointe, Michigan • 3, 5, 6
   Chair, Investment Committee
G. Bert Clark of Atlanta, GA • 1, 5
Erroll B. Davis Jr. of Atlanta, GA • 5, 8
Charles Denton of Brookhaven, GA • 1, 6
Charles S. Gamble of Dunedin, Florida • 4, 5, 8
Michael E. Hill of Washington, D.C. and Chautauqua, New York - ex officio • 3, 4, 5
Nancy Kyler of Staunton, VA • 1, 2, 7
Betsy Bechtolt-Magley of Pittsburgh, PA • 2, 7
Craig Marthinsen of Toronto, Ontario • 3, 4, 5
Anne Odland of West Palm Beach, Florida • 1, 3, 4
   Chair, Audit Committee
Richard Osborne of Charlotte, North Carolina • 2, 4
M. Timothy Renjilian of Atlanta, Georgia • 1, 2, 3, 4, 5, 6, 7, 8
   Chair, Executive Committee
   Chair, Board of Directors
Anne Hoyt Scavone of New York, New York • 3, 6, 7
   Chair, Personnel Committee
Sheila Schroeder of London, England • 3, 4, 5, 8
   Chair, Finance Committee
   Chair, Strategy Committee
George T. Snyder of Pittsburgh, Pennsylvania • 1, 3, 7, 8

Term Expires
2026
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1 - Audit Committee
2 - Development Council
3 - Executive Committee
4 - Finance Committee
5 - Investment Committee
6 - Nominating & Governance Committee
7 - Personnel Committee
8 - Strategy Committee

Officers

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

Staff

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

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