



150 Forward

The Strategic Plan for
Chautauqua Institution
2019–2028

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A rich and vibrant tapestry—this is how I envision Chautauqua.

Composed of single threads woven together, their interconnectedness forms whole cloth. The plan described in the following pages seeks to weave together Chautauqua Institution’s storied past with our inspired present and our bright future. Just as our founders, Lewis Miller and John Heyl Vincent, imagined a community of learners and seekers on the Grounds and beyond, this plan asks us to be bold enough to imagine the Chautauqua of tomorrow that will live on the Grounds, off the Grounds, and online. The plan also celebrates connections among our four founding pillars of the arts, education, religion, and recreation, acknowledging that sometimes the best way to enter dialogue is through song or play or spiritual inquiry.

As you read the words on these pages, note how they are visually framed. Chautauqua’s tapestry is made of countless threads, and it is only in the weaving that its true beauty and unique story emerges. This plan calls us to examine and make choices about the ways in which every thread fits into the tapestry. It challenges us to pull at certain threads to better understand how they touch and weave into others.

As we journey toward our 150th birthday in 2024, this outlined tapestry is a celebration of who we are and an invocation of who we will be. It acknowledges that we cannot be all things to all people, but that must not keep us from boldly stating what we *do* wish to be at this time in our history. Miller and Vincent famously debated whether Chautauqua was a place or a movement. In fact, the needs Chautauqua met were so universal that what was a place *became* a movement. The charge outlined in the following pages calls us to create an expanded community that is both a place and a movement. That is why it prioritizes both optimizing the summer assembly season *and* seeking ways in which we might be Chautauqua outside of that experience. That is why it issues imperatives calling us to diversify who we are, how we fund our work, and how one can and should experience Chautauqua.

I enter into this plan full of hope and excitement. I am awed by the beauty of this unfinished tapestry, and I am honored to ask you to help me weave its next threads.

Michael E. Hill

Michael E. Hill
President, Chautauqua Institution

150 Forward Plan Development

The 150 Forward Plan for Chautauqua Institution was developed over the course of approximately 18 months. This timeline was necessary to provide ample opportunity for community engagement, consultation, research, and dialogue.

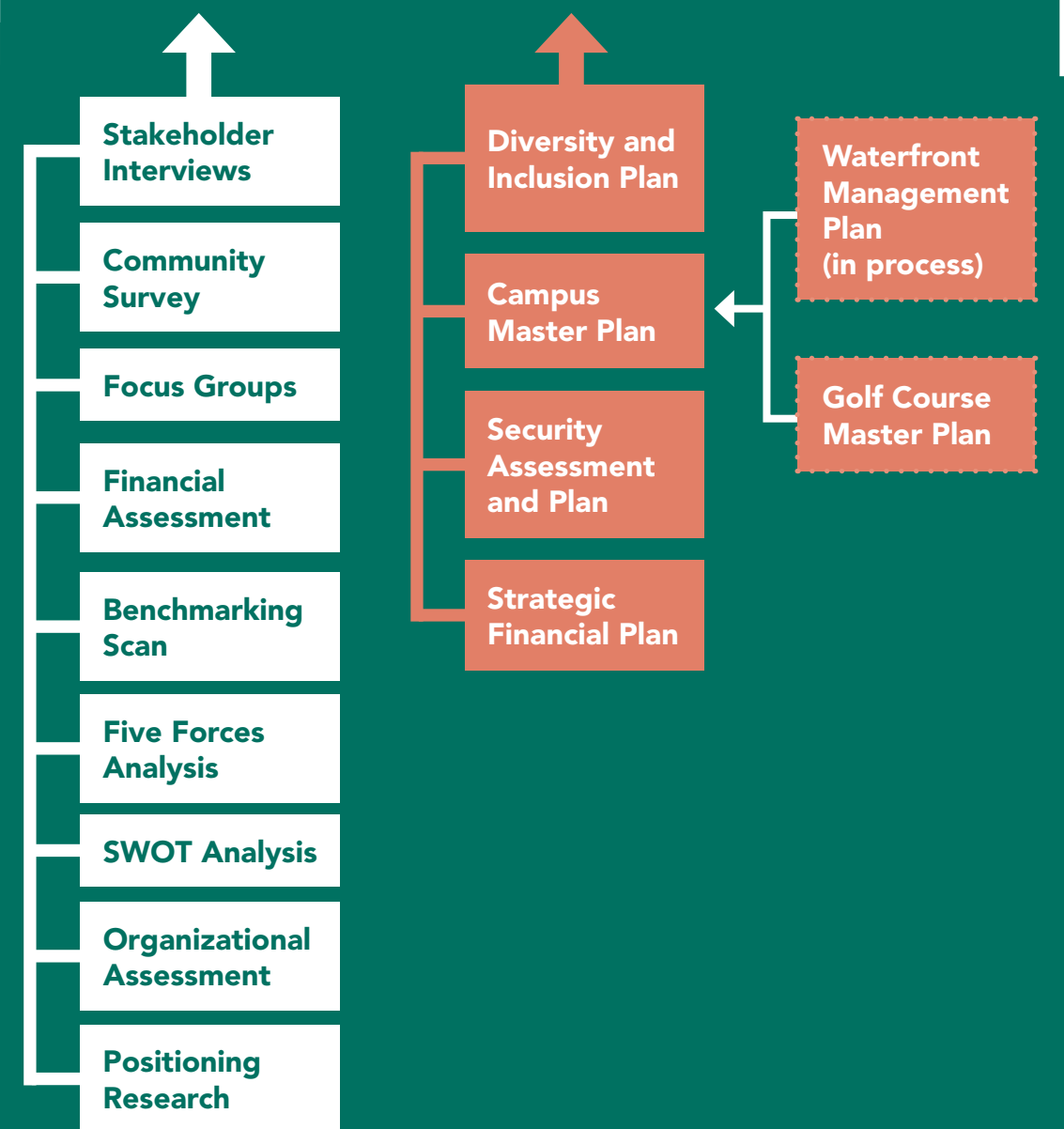
The community engagement phase alone involved:

- 14 staff interviews
- 40 confidential stakeholder interviews
- 4 focus groups with more than 30 participants
- 1,100 survey responses
- 22 listening sessions (Chautauqua Institution, Pittsburgh, Cleveland, Buffalo, Atlanta, Chautauqua County, Florida (Sanibel, Sarasota, Naples, and St. Petersburg)
- 90 Online Submissions of Feedback and Comments

In addition to broad stakeholder engagement, the Institution invested in original research and expert consultation to develop data and analysis to inform plan development and to facilitate the planning process.



150 Forward Plan Development



Chautauqua's Renewed Promise

In a time of universal longing for better and deeper civil discourse in America, the mission of Chautauqua Institution to *explore the best in human values and the enrichment of life* could not be more important or urgent.

Chautauqua's unique approach to engagement seeks to expand each person's capacity for understanding themselves and who they are in relation to the world. As a convener, Chautauqua brings together individuals and communities—both in person and virtually—to build bridges and encourage dialogue that is essential to moving our national conversation forward.

Chautauqua is many things: a vibrant, multigenerational community with shared values and a powerful sense of place; a platform, on and off its Grounds, for leading speakers and artists and for intellectual and spiritual inquiry; and a special place for recreation, reflection, relaxation, family, and fun. The Institution offers a time-tested model for lifelong learning, blending the four pillars of the arts, education, religion, and recreation. It is a place and a movement that fulfills a yearning for social and intellectual connection and civil discourse.

Chautauqua fuses these elements into a community unlike any other. Every summer assembly season, families, friends, couples, and singles gather to partake in a vast menu of opportunities to form a Chautauqua vacation experience tailored to each person's particular interests. First-class performances, thought-provoking educational programs, inspiring interfaith and faith-based experiences, and unique community-wide events invite visitors to engage on their own or with family and friends. The stunningly beautiful, nature-rich lakeside setting is amplified through historic and contemporary art and architecture, modern recreational amenities, and an eclectic array of quiet places to relax. First-time and lifelong visitors alike re-enter the world outside of Chautauqua uniquely renewed and inspired. Little wonder that this remarkable institution has stood the test of time since 1874, and that its four pillars resonate to the current day.

Throughout its history, Chautauqua has also transcended its geographic boundaries and its seasonal focus. Whether through the founding of its Chautauqua Literary and Scientific Circle—one of the first expressions of correspondence education in the United States and a program that continues today—or special convenings that offered a multi-year expression of citizen-to-citizen engagement, Chautauqua has asked the important questions and has found a unique expression through which to seek answers.

Yet even as Chautauqua approaches its 150th anniversary from a position of strength, it cannot afford to become complacent. Fundamental changes in demography, lifestyles, family leisure time preferences, labor supply and

practices, and increased visitor expectations all pose significant challenges to Chautauqua's basic operating model, which has depended (and will depend for some time) on strong attendance and revenue from its summer assembly season. It has generous, loyal donors, but must grow philanthropic support from outside the Chautauqua family and beyond its current seasonal programming model to support long-term financial viability. As a lakeside community and a key economic driver in Chautauqua County, the Institution also is concerned deeply by the rapidly declining health of Chautauqua Lake, a distinguishing characteristic of its hallowed Grounds and the siren song that first called its founders to the location.

As a steward with an eye to the next generation, the Institution bears a special responsibility to respond to these challenges now, before they become crises. To that end, this plan lays out a set of strategies designed to leverage Chautauqua's assets, capabilities, and attributes, resulting in a financially sustainable operating model and a vastly expanded approach to how it delivers its mission.

As importantly, the plan recognizes that at this time in the Institution's history there is intense need to create pathways to civil discourse in our nation through dialogue in community. This need beckons Chautauqua to pursue renewed expressions of its mission using its unparalleled ability to convene, build bridges, establish communities, and encourage deeper intergenerational dialogue around some of America's most pressing issues. Were Chautauqua a summer resort, a religious retreat, or a commercial venture, its contribution to the quality of public discourse might matter less. But Chautauqua is so much more, and it always has been. Accordingly, it is not enough for the Institution to attend to issues in isolation. Chautauqua has an opportunity—perhaps even an obligation—to leverage the power of its speaking, preaching, and artistic platforms to extend conversations beyond the summer assembly season and its Grounds. The Institution's legacy empowers and compels it to reach new audiences and to model and co-create successful and impactful pathways to civil dialogue for individuals and society.

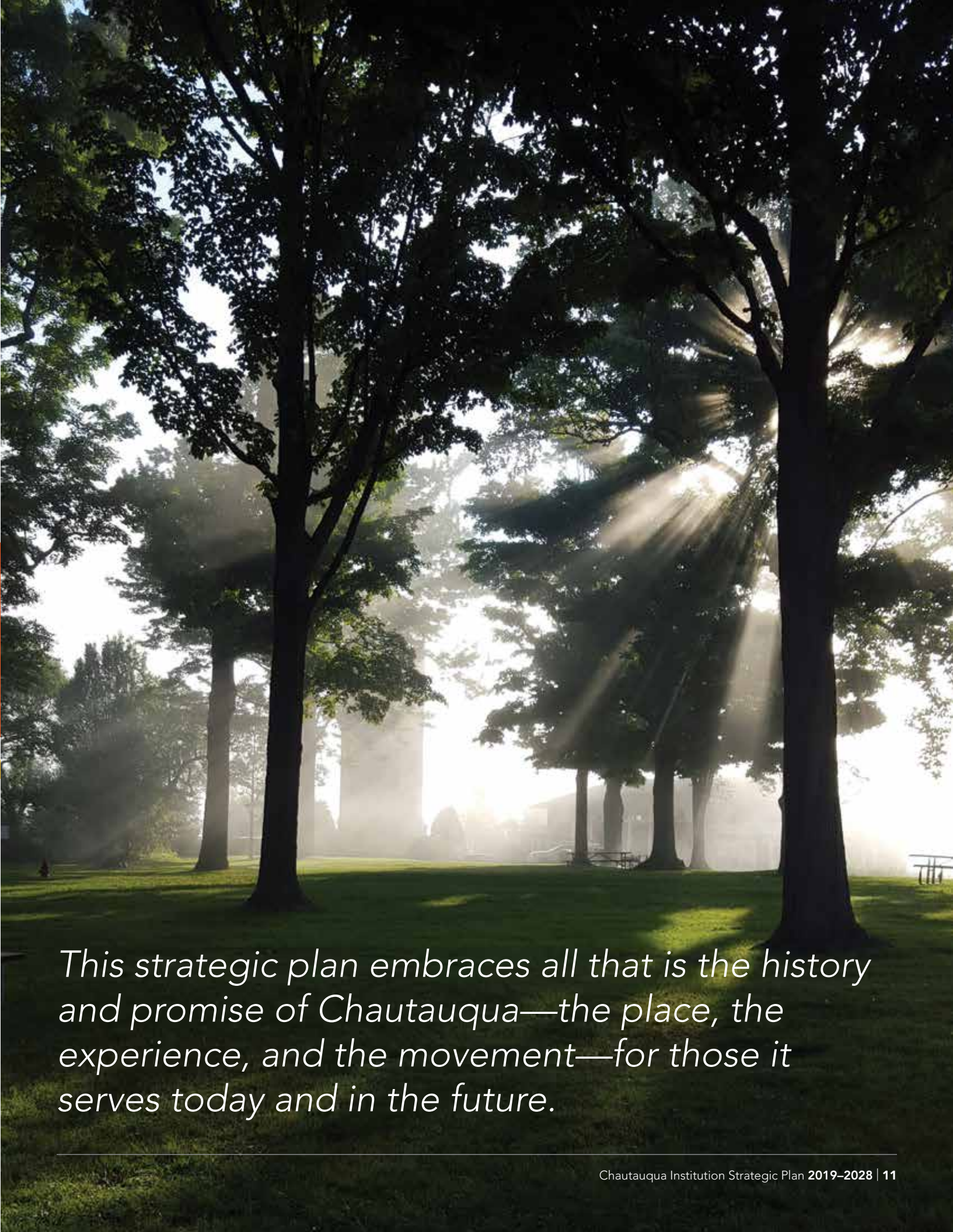
Work has already begun to transform Chautauqua's iconic platforms into springboards for ideas leading toward solutions. Today, beyond the idyllic setting of the Institution, Chautauqua creates opportunities to participate virtually and outside of the summer assembly season, with dynamic online engagement platforms and pre- and post-assembly programming on and off the Grounds. The plan calls for advancing these capabilities to extend dialogue to diverse local, regional, and national communities. Be they gatherings in neighborhoods, town halls, houses of worship, public institutions, or national stages, Chautauqua will leverage its convening power to engage individuals in robust conversation that informs, enlightens, and promotes active citizenship. Harnessing the power of strategic partnerships, the Institution will expand its expertise, invite diverse perspectives, and engage broader audiences in conversation. Known for its quintessential community setting that has inspired so many for nearly 150 years, Chautauqua also has an opportunity to use its Grounds outside of the summer assembly season to convene individuals and organizations seeking inspiration, solutions, and resolutions.

This strategic plan embraces all that is the history and promise of Chautauqua—the place, the experience, and the movement—for those it serves today and in the future.

To that end, we:

- Reaffirm Chautauqua’s central purpose, expressed in its mission and vision;
- Articulate Chautauqua’s shared values—the common beliefs and commitments that govern relationships within its community and with its partners;
- Chart a course for Chautauqua’s strategic direction, both in terms of an overarching ten-year goal and a set of closely related three- to five-year objectives;
- Identify near-term, cross-cutting imperatives for immediate action; and
- Broadly outline the implications of these changes for the Institution’s funding model.

Collectively, these elements provide a roadmap for Chautauqua’s future—one that respects the Institution’s remarkable history and traditions while taking decisive steps to position it for even greater relevance and impact.



This strategic plan embraces all that is the history and promise of Chautauqua—the place, the experience, and the movement—for those it serves today and in the future.

Aspirations

Mission Statement

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

Vision Statement

Chautauqua aspires to create an informed, engaged, and renewed public that fosters and actively contributes to a more civil society, nationally and within the various communities represented by its individual constituents and partners.

Shared Values

Chautauqua is a shared community where people with a thirst for learning and an interest in ongoing self-development are drawn and thrive. Chautauqua's work and interactions with others, as an institution and a community, are inspired and guided by a common set of beliefs and commitments. Together, the Institution and its community value:

- Multigenerational and multidisciplinary engagement through the arts, education, recreation, and religion;
- The dignity and contributions of all people;
- Dialogue to achieve enhanced understanding that leads to positive action;
- The serenity, tradition, safety, and ecology of Chautauqua's historic Grounds and surroundings; and
- A balance between Chautauqua's heritage and the need to innovate.

Overarching Goal (10 Years)

No single goal could ever express the full range of aspirations of Chautauqua's diverse, vibrant community—nor should it. Indeed, the opportunity for self-expression and personal exploration is central to the magic of Chautauqua. But the Institution holds itself to a higher common purpose; to a collective value larger than the sum of its parts. Chautauqua's ten-year goal thus frames its impact model:

Convene diverse perspectives and voices to discover and advance the most important, relevant conversations and experiences of our time, during the summer assembly season and year-round, on the Grounds of the Institution and beyond.

Key Objectives (3–5 Years)

To achieve Chautauqua's ten-year goal, the Institution will focus over the next three to five years on achieving concrete, measurable progress, as reviewed and adjusted periodically, toward the following four broad objectives, all as described in more detail on pages 18–25:

1. Optimize the summer assembly season on the Chautauqua Grounds to provide a first-class experience around the arts, education, religion, and recreation;
2. Expand Chautauqua's convening authority year-round to broaden its impact beyond the summer assembly season;
3. Drive the implementation of a comprehensive, science-based approach to improving the health and sustainability of Chautauqua Lake and elevate its conservation as the centerpiece of the region's economic prosperity; and
4. Grow and diversify revenue to address critical needs, increase financial resiliency, and fund Chautauqua's future.

The Institution believes that the collective impact of accomplishing these objectives would constitute demonstrable progress toward its overarching goal and vision, and that these objectives are meaningful and appropriate expressions of its mission.

The plan identifies key areas of focus for each of these objectives—a kind of shorthand for the most important issues in play. Potential strategies and measures of success also are identified. The measures are intended to be quantifiable, even if specific targets have yet to be set in every case. The strategies are more variable, but in the aggregate reflect the full array of strategic responses to the challenges faced by the Institution. For example, Chautauqua proposes to deepen its penetration of existing markets to attract more visitors to the Grounds and to year-round programming. Also included are ideas about diversifying programmatic offerings and developing new products and services that meet the needs of current and prospective visitors alike. Finally, the plan suggests ways for the Institution to expand into new markets to attract new and more diverse audiences.

In addition to implementing these traditional market development strategies, Chautauqua must commit to the rigorous evaluation and continuous improvement of its existing programs and offerings. The Institution can only attain its higher aspirations if it is honest with itself about what it does well and where it could improve, as well as the financial implications of investment in, or elimination of, programs and facilities.

Cross-Cutting Imperatives (1–3 Years)

By design, the key objectives and their corresponding strategies must be implemented organization-wide and will require the involvement and investment of all stakeholders. To execute effectively in pursuit of the key objectives, Chautauqua must operate with agility across its myriad administrative units, programs, venues, audiences, and constituencies. Cross-cutting imperatives enable Institution-wide action on important organizational capabilities needed to achieve Chautauqua's mission.

The list of cross-cutting imperatives will evolve over time as new opportunities or issues emerge. Some of the imperatives require significant infusion of resources and attention; others may be less expensive but take longer to fully embed in the organization's DNA. All will require sustained attention for the duration of the plan. Chautauqua envisions focusing on the following four imperatives over the next three years:

Strategic Partnerships: Creative, well-negotiated partnerships will be essential to addressing Chautauqua's challenges and leveraging its opportunities going forward. To extend the Institution's reach and amplify its message, Chautauqua must cultivate a range of strategic partnerships with academic, religious, and cultural institutions, as well as with media and communications companies. To address obvious labor and housing challenges, the plan contemplates partnering with regional government, the regional community, and economic development organizations. Innovative partnerships can also add value and diversity to Chautauqua's programming during the summer assembly season. Intentionality and consistency in partnership development and stewardship will benefit the Institution's impact and bottom line alike.

Mobilization of Technology: To achieve the goals and objectives in this plan, Chautauqua must prioritize major investments to harness the power of technology at every level. This will require a comprehensive and integrated approach to strategically deploying technology to enhance the guest experience; focus and manage the organization in an increasingly volatile marketplace; catapult the Institution's convening authority to millions who may never visit the Grounds; and enhance Chautauqua's reputation as a strategic partner and convener. Indeed, with such significant needs and so many potential applications, this will be crucial.

Labor and Talent Solutions: Chautauqua Institution's primary physical location in Western New York, its current seasonal nature, and a general trend toward alternative work arrangements will continue to present a challenge within a highly competitive market. Chautauqua requires a comprehensive human capital management plan and workforce planning solutions to recruit, develop, and retain a diverse workforce that encompasses all the skills and experience necessary to deliver on its long-term strategic vision and to provide an environment for that workforce that positions the organization as an "employer of choice" on the national stage.

Inclusion, Diversity, Equity, and Accessibility (IDEA): Chautauqua's community must commit to a conscious, sustained effort to instill the values of inclusion, diversity, equity, and accessibility throughout the fabric of Chautauqua. Although the Institution's artists, chaplains, and lecture speakers reflect the demography of America in the 21st century, its larger community does not. To remain relevant and attractive to future audiences, the Institution therefore is committed to taking thoughtful but decisive action to create the conditions in which everyone feels that they can engage as full and valued participants in the Chautauqua experience.

Chautauqua has always relied on a mix of earned income and philanthropy to pursue its mission and deliver programming. In recent years, the Institution has made growth in summer assembly season attendance and cost controls its primary strategies to achieve financial stability. This approach has been substantially successful during the last decade—enabling the Institution to weather the 2008–2010 financial downturn and, thereafter, to achieve positive financial results annually. Nevertheless, considering the challenges the Institution faces, this approach alone cannot deliver a financially sustainable Chautauqua. To remain financially viable in the long-term, Chautauqua must grow its revenue through a multi-faceted strategy that emphasizes increased attendance, revenue diversification, responsible price increases, and transformational philanthropy.

This strategic plan anticipates a much greater role for philanthropy. It will continue, as now, to serve as the source of funding for all material new or restorative capital projects while also representing, by 2024, a materially larger percentage of annual total operating revenues. With the Institution's expansion of its year-round programming and concurrent expansion into new platforms and venues designed to reach a broader audience, Chautauqua has the opportunity to engage with foundations and other institutional donors who otherwise would not support programs that are limited in time and place. Chautauqua also has significant potential for crafting marketing partnerships that have a philanthropic component. A cultural shift is necessary: participation in philanthropy must become an ingrained part of the Chautauqua experience and culture.

To effectively pursue the aspirations of this plan, Chautauqua Institution will determine prioritization across and within the plan's key objectives, strategies, and cross-cutting imperatives. With these priorities established, the Institution will then assess and deploy existing and new resources, structures and investments that are aligned with the direction outlined in 150 Forward. Detailed operational plans and corresponding metrics-based monitoring and evaluation tools, integrated into Chautauqua's multi-year budgeting process, will enable leadership and staff to assess the impact of current and prospective activities and make adjustments and corrections as necessary. This approach will also allow for transparency and information sharing across the organization, empowering staff at all levels to contribute to and understand their roles and responsibilities with regard to operational plans, benchmarks, measures of success, and outcomes. A standard reporting framework and protocol will be created for ongoing Board of Trustees oversight and a new Board committee will be formed to conduct ongoing, comprehensive assessment of plan performance. President Michael E. Hill will annually present a 150 Forward Status Report to the Chautauqua Community. This approach to plan implementation, monitoring, and evaluation will, itself, build institutional capacity for the future.

Funding Model

Plan Implementation, Monitoring, and Evaluation

THE 150 FORWARD PLAN

CHAUTAUQUA'S MISSION

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

Vision

Chautauqua aspires to create an informed, engaged, and renewed public that fosters and actively contributes to a more civil society, nationally and within the various communities represented by its individual constituents and partners.

Shared Values

Multigenerational and multidisciplinary engagement through the arts, education, religion, and recreation

The dignity and contributions of all people

Dialogue to achieve enhanced understanding that leads to positive action

The serenity, tradition, safety, and ecology of Chautauqua's historic Grounds and surroundings

A balance between Chautauqua's heritage and the need to innovate

Overarching Goal (10 Years)

Convene diverse perspectives and voices to discover and advance the most important, relevant conversations and experiences of our time during the summer assembly season and year-round, on the Grounds of the Institution and beyond.

Key Objectives (3–5 Years)

Optimize the Summer Assembly Season on the Chautauqua Grounds to Provide a First-Class Experience Around the Arts, Education, Religion, and Recreation

Expand Chautauqua's Convening Authority Year-Round to Broaden its Impact Beyond the Summer Assembly Season

Drive the Implementation of a Comprehensive, Science-Based Approach to Improving the Health and Sustainability of Chautauqua Lake and Elevate its Conservation as the Centerpiece of the Region's Economic Prosperity

Grow and Diversify Revenue to Address Critical Needs, Increase Financial Resiliency, and Fund Chautauqua's Future

Cross-Cutting Imperatives (1–3 Years)

Strategic Partnerships

Mobilization of Technology

Labor and Talent Solutions

Inclusion, Diversity, Equity, and Accessibility (IDEA)



Key Objective 1:

Optimize the Summer Assembly Season on the Chautauqua Grounds to Provide a First-Class Experience Around the Arts, Education, Religion, and Recreation

Areas of Focus:

- Increasing attendance to allow earned revenue to grow without pressure to increase pricing
- Ensuring appropriate return on investment for program and facilities
- Achieving best-in-class guest experience and delivering greater value to first-time and returning Chautauquans

Key Strategies:

- Invest immediately in upgrading hotel and food/beverage options, in partnership with outside vendors
- Transition to a point-of-sale/constituent relationship management system to monitor and manage growth of attendance and achieve target market goals
- Better evaluate program performance and ensure alignment with guest expectations
- Pursue program-aligned niche group businesses (e.g., Aria Tours for Opera)
- Become a “best vacation/travel destination” among target markets
- Ensure pricing optimization to increase guest perception of overall value
- Leverage technology and training for management performance

By 2024, we will:

- Grow long-term attendance to a sustained level of 150,000 person days, up from 142,857 person days in 2018;
- Achieve a Net Promoter Score on guest perception of overall value (including Hotel guests) equal to or greater than 60%, up from 48.5% in 2018;
- Achieve a sustained growth rate in total operating revenue (including annually spendable philanthropy) that is greater than the rate of growth in direct operating expense; and
- Achieve a gain from operations before capital spending that is equal to or greater than 12% of total revenue (inclusive of philanthropy spendable for operations in the year of its receipt), up from 8.6% in 2018.



Key Objective 2:

Expand Chautauqua's Convening Authority Year-Round to Broaden its Impact Beyond the Summer Assembly Season

Areas of Focus:

- Developing platforms and venues to build upon and fully leverage summer assembly content and to create new and more expansive Chautauqua experiences
- Forging partnerships to generate and disseminate first-class content and increase impact
- Strengthening brand awareness to reach new, larger, and more diverse audiences for Chautauqua

Key Strategies:

- Launch and successfully implement new platforms (digital and other) that position Chautauqua as a convener and leader of civil dialogue
- Extend and repurpose one-week assembly conversations for use in stimulating dialogue in diverse local, regional, and national communities
- Demonstrate to outside organizations the benefits of Chautauqua's location, Grounds, and facilities to provide a unique environment for engaging audiences during the shoulder seasons
- Pursue strategic partnerships that harness world-leading expertise and diverse perspectives to deepen global understanding, foster community dialogue, and, ultimately, promote active citizenship

By 2024, we will:

- Extend Chautauqua's yearly programmatic reach to not less than six months of activity through on- and off-grounds partnerships and programming;
- Grow digital engagement/participation by a minimum of 10% as measured by live-stream and archived content views;
- Grow off-season, on-Grounds accommodations volume/occupancy, including hotel and private accommodation rentals, to yield not less than \$1 million in net contribution margin;
- Grow off-season, on-Grounds conferencing/enterprise revenues by \$1 million in net contribution margin; and
- Embed into our year-round programming at least five major mission-related initiatives, through formal partnerships with media, corporate/foundation or major individual investor support, that meet at least one of two criteria:
 - Yields significant new brand impressions of 250,000 or more through increases in website traffic, event attendance, and social media followers and engagements; or
 - Yields net contribution margin of at least \$975,000 per year.



Key Objective 3:

Drive the Implementation of a Comprehensive, Science-Based Approach to Improving the Health and Sustainability of Chautauqua Lake and Elevate its Conservation as the Centerpiece of the Region's Economic Prosperity

Areas of Focus:

- Creating watershed-wide alliances that result in a coordinated approach among local stakeholders to tackling the issues facing the lake
- Harnessing science-based solutions to ensure a lake ecosystem that benefits people and sustains wildlife for generations to come
- Creating a comprehensive public affairs/government relations program to encourage local, state, and national partners—both public and private—to act on the issues impacting the lake

Key Strategies:

- Create county- and state-wide coalitions to increase lake-related advocacy and funding from public and private entities
- Create and implement a “science first” program focused on lake conservation and restoration by implementing strategic partnerships with local/state governments, academe and corporations
- Create a 2.0 plan for the Chautauqua Grounds recognizing that, to lead the conversation, the actions of the Institution and its community must be beyond reproach

By 2024, we will:

- Increase funding from public and private entities that allows for implementation of a comprehensive, watershed-wide approach;
- Implement a robust advocacy and government affairs program that ensures that Chautauqua Institution has a principal seat at the table for all major conversations that impact the health and sustainability of Chautauqua Lake;
- Reduce nuisance aquatic plants and harmful algal blooms in both basins of the lake;
- Consistently achieve the highest quality measure of drinking water safety from the Chautauqua Utility District;
- Implement healthy, natural landscape filters in all areas of significant runoff in target watershed areas on the Grounds and elsewhere in the watershed;
- Create a comprehensive, science-based strategic partnership that brings actionable data and viable policy organization to bear to implement solutions; and
- Achieve removal of the NYS Department of Environmental Conservation designation of Chautauqua Lake under the Clean Water Act as “impaired” due to high nutrient content.



Key Objective 4:

Grow and Diversify Revenue to Address Critical Needs, Increase Financial Resiliency, and Fund Chautauqua's Future

Areas of Focus:

- Growing philanthropy to support new emphasis on convening and reduce pressure on outsized increases in attendance or pricing
- Securing favorable alternative financing, where available and appropriate, to augment philanthropy and provide flexible capital funds for major infrastructure improvements
- Pursuing new or complementary lines of business to help ensure long-term financial sustainability

Key Strategies:

- Build a culture of philanthropy that is integrated throughout the Institution staff, the Institution and Foundation boards, and the entire community
- Expand Chautauqua's prospect pool of donors to include organizations and individuals whose interests align with the Institution's mission and initiatives, but who may not regularly experience or visit the Chautauqua Grounds. Examples of such organizations include national, regional, and local foundations; federal, state, and local governments; corporations; and other entities such as pension funds and academic institutions
- Effectively convert an increasingly larger number of property owners and Chautauqua visitors into consistent donors
- Increase philanthropic investment of existing donors
- Develop mission-aligned business lines that monetize the Institution's key capabilities, such as its convening authority

By 2024, we will:

- Have a budget in which total annually spendable philanthropy (regardless of source) represents 90% of gate and parking revenue (versus 48% in 2018) and 30% of total revenue (versus 19% in 2018);
- Receive \$6.5 million in annually spendable philanthropy from donors who do not hold long-term gate passes during the summer assembly season, including institutional donors, representing an increase of 723% over 2018;
- Receive \$6.3 million in annually spendable philanthropy from donors who hold long-term gate passes during the summer assembly season, representing an increase of 38.5% over 2018;
- Increase the value of the endowment held by the Chautauqua Foundation to \$125 million through increased philanthropic giving, representing an increase of 40% over 2018; and
- Grow revenue from new or complementary lines of business by a total of \$6.5 million (\$5.5 million philanthropy and \$1 million earned revenue), contributing 20% to overhead and achieving 15% net contribution margin (net contribution margin=total revenue less total direct expense).

150 Forward

This plan imagines the impact that Chautauqua will have by the time it reaches its sesquicentennial in 2024 and sets its sights on an even more robust future in service to a timeless mission.

The 150 Forward vision calls Chautauqua to lean into its distinctive capacity to bring people together. Its founding pillars of the arts, education, religion, and recreation serve as core threads that touch and complement each other, weaving a remarkable tapestry that is and will be Chautauqua Institution.

As the strands of this plan come together, we imagine Chautauqua in 2028:

- Chautauqua's name is synonymous with civil dialogue in communities across the nation through a program of year-round engagement and thought leadership, and our summer assembly season exemplifies the very best of what Chautauqua and Chautauquans can achieve through enhanced awareness and understanding, and a true commitment to the progress of humankind.
- Our revenue streams are diversified, with transformational growth in private philanthropy complemented by investments from regional and national foundations and corporate support that speaks to our impact in the world. Income-producing operations on and off the Grounds represent a growing part of Chautauqua's revenue mix, and the historic campus in Western New York is a destination of choice for conference and retreat programming in addition to major life, family, and friendship celebrations.
- Chautauqua Lake is well on its way to becoming a healthy freshwater body among New York State's best examples of lake conservation, negative ecological trend reversal, and community collaboration.
- Chautauqua is lauded as a legacy organization and community that prioritizes inclusion, diversity, equity, and access, and the Institution's strategies for broadening its circle of engagement have begun to form a new model for diversity transformation.
- The Institution's increased programming and activity on the Grounds outside of the summer assembly season leads to more life-sustaining, full-time jobs in Chautauqua County while also contributing to regional economic development through expanded tourism and business growth.

And woven into every strand are the current and future Chautauquans who learn, ask and imagine together, seeking the best in human values, now and always.



In a time of universal longing for better and deeper civil discourse in America, the mission of Chautauqua Institution to *explore the best in human values and the enrichment of life* could not be more important or urgent.

