TABLE OF CONTENTS

Statement of Purpose/Mission Statement 1
Message from Leadership 2–3
Fundraising Report 4–5
Lifetime Giving 6–7
Financial Reports
  Treasurer’s Report 8–11
  Audited Financial Statements 12–21
Endowment Funds 22–31

Donor Recognition
  Cumulative Support to Endowment 32–35
  Fiscal 2016 Contributors to Endowment 36–39
  2016 Memorial Gifts 40
  2016 Honorary Gifts 40
  The Eleanor B. Daugherty Society 42–43
Directors, Officers, and Staff 44
Former Directors 45
STATEMENT OF PURPOSE

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

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

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

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

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

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

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

MISSION STATEMENT

Adopted by the Chautauqua Foundation Board of Directors August 13, 1992.

Chautauqua Foundation, Inc., is the principal organization responsible for the philanthropic funding of the Chautauqua Institution. In this role it will:

Develop and maintain programs, products and vehicles appropriate to the philanthropic needs of the Institution as determined by the Board of Trustees and the Administration.

Assure fiduciary care in the investment, custody and administration of funds raised.

Disburse funds to the Chautauqua Institution in compliance with the Chautauqua Foundation Articles of Incorporation and the requirements imposed by donors.

Develop and maintain a competent and active Board of Directors and other volunteers as appropriate.

Develop, maintain and direct a professional staff appropriate to carry out the above responsibilities.

In the discharge of its responsibilities, the Chautauqua Foundation will be guided by the Chautauqua Challenge as adopted by the Board of Trustees. The Foundation will be dedicated to quality and integrity in all of its internal and external relationships. The Foundation will anticipate and accept change while maintaining an understanding and appreciation of the history of the Chautauqua Institution in general and the Foundation in particular.
Dear friends,

Annually, setting the amount to be distributed to the Institution for the subsequent year of the Institution’s operations is the single most significant action undertaken by the Foundation’s board. Again this past year, the “payout” decision made in June 2015 to determine the distribution for 2016 helped set the course for the Institution’s budget planning for this summer and the quality of the program delivered.

However this past year was not an ordinary year. During the fiscal year that ended at the conclusion of March, the Foundation and the Institution extended its normal collaborative conversations and produced results that will have a deep impact on the life of the Institution. As a result of several years of discussion among the leaders of the two boards, the board of the Foundation agreed to participate in the Amphitheater project and be a critical element in the Institution’s Board of Trustee’s determination to proceed with the renewal of that space.

At its meeting last fall, the Foundation’s board agreed to provide interim financing to help cover the costs committed to the construction of the facility during the time in which donors agreed to pay their individual pledges. In order to do so without affecting the make-up of our invested portfolio, the Foundation entered into a line of credit with First Niagara Bank to cover any draw on capital that will ultimately be repaid through pledge payments.

### Chautauqua’s Promise

Committed amounts as of March 31, 2016

<table>
<thead>
<tr>
<th>Project</th>
<th>Goal</th>
<th>Committed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unspecified Endowment</td>
<td>$15.65 million</td>
<td>$11.6 million</td>
</tr>
<tr>
<td>Bellinger Hall</td>
<td>Goal: $5.5 million</td>
<td>Committed: $5,000</td>
</tr>
<tr>
<td>Hagen-Wensley House</td>
<td>Completed: $2.8 million</td>
<td></td>
</tr>
<tr>
<td>The Lake, the Grounds, and Public Spaces</td>
<td>Goal: $6.25 million</td>
<td>Committed: $6.8 million</td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>Goal: $22 million over the life of the campaign</td>
<td>Committed: $19.1 million</td>
</tr>
</tbody>
</table>
Secondly, the Foundation decided to reallocate an unrestricted testamentary gift that was received during the Promise Campaign, with the knowledge and concurrence of the donor’s widow, to the Amphitheater project. With this gift and others generated both within and prior to the Promise Campaign’s commencement, adequate philanthropic funding was available to proceed with the Amphitheater project.

Both of these decisions required considerations by the directors of the Foundation that were new and necessitated a level of dialogue and cooperation that had not before been required of our two organizations. The determining factor throughout these deliberations was what served the best interests of Chautauqua Institution, the Foundation’s sole beneficiary.

Of course the Foundation’s board was happily put into the position of making these decisions as a result of the generosity of Chautauquans who invested in the Amphitheater during the Promise Campaign. The Foundation is responsible for all philanthropy that benefits Chautauqua — endowment, annual giving and capital support — and we are grateful to all who enabled the campaign to reach $95 million by the end of the 2016 fiscal year, the fifth of this six-year campaign which will conclude December 31, 2016. At this writing, gifts to the Promise Campaign exceed $97 million.

This past year has been neither routine or without significance. The staff of the Foundation and the directors have been challenged and enthused by the opportunity to look anew at how we conduct our business and work with the Institution in service to this community.

As you read through this report you will see detailed information concerning the Foundation’s balance sheet, invested assets, asset allocation and performance during the year. We welcome your questions about any of this information or any issue regarding the Foundation. In these pages, you will also see a record of the philanthropy that has specifically benefitted the Foundation during its past year. Gifts to the Chautauqua Fund and for capital purposes are recognized each year in the off-season winter Chautauquan.

To all of you who help Chautauqua flourish with your gifts, we thank you. We are eager to work with you in the months and years ahead to build a deeper relationship and a stronger and more effective Institution.

Sincerely,

Cathy Bonner,  
Chair, Board of Directors

Geof Follansbee,  
Chief Executive Officer

Chautauqua’s Amphitheater  
Capital Goal: $30 million  
Committed: $39.1 million  
Endowment for Maintenance Goal: $3.5 million  
Committed: $519,000

Endowed Scholarships Goal: $2 million  
Committed: $1.5 million

Leadership Endowment Goal: $2.5 million  
Committed: $2 million

Program Enhancements and Innovation Goal: $8 million  
Committed: $11.3 million
Total Philanthropic Activity

In this past fiscal year, Chautauquans have generously supported Chautauqua Institution with nearly $22 million in total philanthropy which includes pledges, outright gifts and planned gifts.

The information below is based on fiscal years ended on March 31. Certain amounts in prior periods have been reclassified to reflect gifts transferred to a different category.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Chautauqua Fund</th>
<th>Endowment</th>
<th>Capital &amp; Other</th>
<th>Total</th>
<th>Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$3,707,326</td>
<td>$9,326,210</td>
<td>$8,834,104</td>
<td>$21,867,640</td>
<td>2,973</td>
</tr>
<tr>
<td>2015</td>
<td>$3,974,259</td>
<td>$3,545,650</td>
<td>$11,489,663</td>
<td>$19,009,572</td>
<td>2,873</td>
</tr>
<tr>
<td>2014</td>
<td>$3,563,728</td>
<td>$7,816,690</td>
<td>$14,356,124</td>
<td>$25,736,542</td>
<td>2,952</td>
</tr>
<tr>
<td>2013</td>
<td>$3,514,364</td>
<td>$7,054,029</td>
<td>$7,469,254</td>
<td>$18,037,647</td>
<td>3,185</td>
</tr>
<tr>
<td>2012</td>
<td>$3,566,002</td>
<td>$4,209,622</td>
<td>$2,735,031</td>
<td>$10,510,655</td>
<td>3,351</td>
</tr>
</tbody>
</table>

Chautauqua Fund

All gifts to the Chautauqua Fund are transferred to the Institution and used in the annual operating budget of the Institution to support the full range of programming Chautauqua offers.

Donors who have made an annual Chautauqua Fund gift are recognized on a calendar year basis in the winter Chautauquan.

Endowment

All gifts to endowment are made to the Foundation for investment and then made available to the Institution according to the spending policy established by the board of directors of the Foundation.

Donors who have made an Endowment gift are recognized on pages 32–39.

Capital & Other

All gifts to capital projects and other special gifts are made directly to the Institution and are reported accordingly in their audited financial statements. They primarily support the renovation or construction of facilities and also supplement the operating budget for extraordinary program initiatives.

Donors who have made capital or special gifts are recognized on a calendar year basis in the winter Chautauquan.
Five-Year Average Cost of Fundraising

The costs of fundraising efforts performed by the Foundation on behalf of the Institution are reported in the Foundation’s audited financial statements. These costs provide all three categories of philanthropy to the Institution. The five-year average of such costs as a percentage of total philanthropy has decreased from 11.1% to 6.3% over the past 5 years.

Total Giving by Area of Support

This chart represents total philanthropy of $21.9 million for the fiscal year ended March 31, 2016 by area of support.
Numerous individuals and organizations have expressed their commitment to Chautauqua through extraordinary expressions of philanthropy. This lifetime giving list recognizes and thanks the cumulative generosity of donors who have pledged or transferred, outright or as part of certain planned gift commitments, to the annual Chautauqua Fund, capital projects or endowment a cumulative amount in excess of $250,000.

We have highlighted donors new to this list in orange.

**$1,000,000 to $2,499,999**
Mr. and Mrs. Edward P. Boyle
Jean and Tom Bromeley
Mrs. Robert D. Campbell
Chautauqua Women’s Club, Inc.
Mr. and Mrs. George L. Cornell
Dr. and Mrs. R. William Cornell
Mrs. Robert W. Cornell
Mrs. Grant A. Dibert
Lauren Rich Fine and Gary Giller
Mr. and Mrs. Robert K. Fletcher
Char and Chuck Fowler
Barbara and Peter Georgescu
Mr. and Mrs. William R. Goodell
Stewart and Donna Kohl
Dr. and Mrs. W.R. Konneker
The Kresge Foundation
Mrs. Charles H. Lytle
The Milton and Tamar Maltz Family Foundation
Cathy and Jesse Marion
Mary Anne and John Morefield
New York State Council on the Arts
Hale and Judy Oliver
Steve and Polly Percy
Harold and Martha Reed
Mr. and Mrs. Robert M. Smith
Mr. and Mrs. Ralph Swingle
Helen Truman Trust

**$250,000 to $499,999**
Jane A. Gross
Thomas and Kathleen Harrick
Dorothy and Bill Hill
Dr. Michael G. and Carol
Nobel Hirsh
Karín A. Johnson
Trust of William D. Kuhns
Jim and Lynn Levinson
Lilly Endowment, Inc.
Helen T. Logan Charitable Trust
Dr. and Mrs. John W. McCredie, Jr.
Robert and Sally Metzgar
Mr. and Mrs. John A. Miles
George E. and Susan Moran Murphy
Ralph H. and Elizabeth C.
Norton Philanthropic Trust
Office Depot Foundation, Inc.
Miriam S. Reading and Richard H. Miller
Mr. and Mrs. H. Parker Sharp
Mr. and Mrs. J. Bruce Stromgren
Robert and Joyce Tate
The Tumey Family
Mr. and Mrs. Robert O. Wilder

**Greater than $5,000,000**
Susan and Tom Hagen
Mary and Oliver Langenberg
Patty and Spencer Van Kirk, III

**$2,500,000 to $4,999,999**
The Carnahan-Jackson Foundation
Jack Connolly
Emily and John Corry
Gebbie Foundation, Inc.
The Hultquist Foundation, Inc.
The Lenna Foundation
Elizabeth S. Lenna
Joan and David Lincoln
Lippman Kanfer Family Foundation
Kay H. Logan
Richard and Elaine Rieser
Ralph C. Sheldon Foundation, Inc.
Mr. and Mrs. Richard K. Smucker
Lowell and Rebecca Strohl and Family

**$500,000 to $999,999**
Edward L. Anderson, Jr. Foundation, Inc.
Andy and Peggy Anderson
John E. Anderson
Sandy and Quint Anderson
Edward L. Anderson and Joan E. Parsons
Clement and Karen Arrison Foundation
Barbara and Arthur Banner
Mr. and Mrs. Richard L. Bechtolt
June Bonyor
Mary Boyle and Ted Arnn
P. James and Barbara A. Brady
Kathy and James Braham
Twig and Barbara Branch
Mr. and Mrs. John E. Britton
John W. and Anne Staples Burden
Chautauqua County Visitors’ Bureau
Chautauqua Opera Guild
Geoff and Kathie Church
Marty and Sandy Coyle
The Crockett Family
The Jessie Smith Darrah Fund
The Winifred C. Dibert Foundation, Inc.
June and Barry Dietrich
Elizabeth Elser Doolittle Charitable Trust
Shirley A. and Arthur R. Duffy
Arthur E. Earley
Mr. and Mrs. Hal A. Fausnau
Mr. and Mrs. James L. Flynn
Dr. and Mrs. Myron B. Franks Chip and Gail Gamble
vic and Joan gelb
Mr. and Mrs. Timothy B. Goodell
S. Allen Goodwin
Jim and Elisabeth Groninger
Becky and Fred K. Habenicht, Jr.
Kathleen E. Hancock
Ms. Verna Harrah
Lisa Heinz
Bill and Angela James
The Johnson Foundation
W. Alton Jones Foundation
Kevin and Joan Keogh
Ron and Rosie Kilpatrick
Mary Kuhns Trust
Blossom Leibowitz
Mrs. John C. Lincoln
James H. Lynch, Jr.
Dr. Barb Mackey
Chris and Sue Martin
Warren K. Martin
Dr. and Mrs. Frank E. McElree, Jr.
Bruce W. and Sarah Hagen McWilliams
Cornelia Chason Miller
Ministrare, Inc.
Miss Jane C. Morgan
Mr. and Mrs. Lewis W. Morgan
National Endowment for the Arts
Steve and Anne Odland
The John R. Oishei Foundation
The Estate of Gail Clement Olson
Robert A. Ott, Jr.
Mr. and Mrs. William H. Park
Deloras Pemberton
Kathy and Jim Pender and the Michael Pender Memorial Fund of the Cleveland Foundation
EVERY GIFT MATTERS

Sheila Penrose and Ernest Mahaffey
PNC Financial Services Group
Richard A. and Esther M. Popp
Mrs. Lois Raynow
Mrs. Bartlett Richards
Molly F. Rinehart and Charles L. Christian
Marjorie McCarthy Robins
Joseph H. & Florence E. Roblee Foundation
Herbert B. and Gerda Sachse
Mr. and Mrs. Ralph C. Sheldon, Jr.
Mr. and Mrs. Henry B. Suhr, Jr.
Susan and John Turben Foundation
John and Linda Wadsworth
Dr. and Mrs. Robert J. Weiss
Norman and Marilyn Weizenbaum
The Margaret L. Wendt Foundation
Lutie Soper Wilsdon Memorial
Virginia H. and Robert R. Young
Mr. and Mrs. Howard Zemsky
Sam and Shirley Zemsky
Steve Zenczak and Pat Feighan

DAVID AND JOAN LINCOLN

David and Joan Lincoln’s generosity is omnipresent at Chautauqua. Spending many years with their family enjoying all or part of their summers here, David and Joan have left their indelible mark on Chautauqua.

For nineteen years the Lincoln family’s support and devotion to the exploration of ethical behavior has created the Lincoln Program in Applied Ethics, a cornerstone program that has become entrenched in Chautauqua’s programming. The program originally sponsored ethics scholars during one week of the season, but beginning in 2015 it was expanded to allow Chautauquans to explore the ethical implications of a variety of topics that shape their lives throughout the season.

Joan Lincoln passed away March 7, 2016 at the age of 88. She loved to describe her passion as “playing with mud.” Joan and David’s generosity is of particular significance to Joan and her fellow “mudders,” at the Joan R. Lincoln Ceramics Center at the Arts Quad and through the endowment for ceramics that bears her name. Speaking at Joan’s memorial service in Paradise Valley, Arizona, where Joan had served as mayor for several years, Tom Becker described Joan as follows: “Joan was an artist of rare skill, expansive experience, discipline, urgency of purpose, clarity of expression. And ultimately one with an abundance of wonder and awe at the dazzling beauty of life and the expression of mystery that runs through it. Joan Lincoln was a beautiful human being. She made her life — as a wife, mother, grandmother, mayor, educator, collector, and potter — a work of art.”

Most recently and as part of the Promise Campaign, with proceeds from the sale of a family residence gifted to the Foundation, David Lincoln made a significant addition to the Helen Colvill Lincoln Fund. This permanent endowment provides for the care and maintenance of the John C. Lincoln Dormitory which was funded by Helen Lincoln, David’s mother, in memory of her late husband and David’s father, John. The dormitory provides housing for Chautauqua’s fine and performing arts students each summer.

Chautauqua Institution and our community have benefited greatly from Joan and David Lincoln’s tenacity to use their passions to transform the world around them.

EVERY GIFT MATTERS
Financial Overview

Total assets of the Foundation were $87.4 million as of March 31, 2016 and net assets were $78.9 million. The Foundation acquired the Lewis Miller Cottage through a generous gift from a donor, to be held temporarily by the Foundation and ultimately transferred to the Institution. Also during the year, the Foundation’s board of directors decided to transfer an unrestricted gift to the Institution for use in the Amphitheater project. The gift, still payable to the Institution as of March 31, 2016, was mostly held in a separate account at Hirtle Callaghan & Co. for temporarily restricted funds.

The Foundation also made changes in the presentation of the audited financial statements. Certain funds were reclassified to unrestricted net assets and the footnotes for net assets were revised to explain the different components of net assets. Additional categories were added to the Statement of Activities and the Supplemental Schedule of Expenses to further distinguish between activity in temporarily restricted funds and the endowment.

Endowment Net Assets

The net asset balance of the 693 active endowment funds as of March 31, 2016 was $71.2 million. This balance represents the sum total of each endowment fund as of March 31, 2016. Endowment funds are comprised of board-designated, term, and permanently restricted endowments to be held in perpetuity for the benefit of the Institution. This chart represents the allocation of the total net asset balances of active endowment funds as of March 31, 2016 by area of support.

Support to the Institution

The Foundation’s spending includes direct and indirect support to the Institution, administrative costs of running the Foundation, and investment management fees. Indirect support represents the costs incurred by the Foundation in providing development services on behalf of the Institution. Direct support from the endowment represents distributions to the Institution toward the operating budget for both specified and unspecified purposes. The amount to be distributed from the endowment is determined annually by taking the prior year’s distribution and the prorata payout from new gifts received during the year and increasing that amount by an inflation factor. Additionally, in 2016 the decision to transfer an unrestricted gift treated as if it were endowment to the Institution for the Amphitheater project is reported as support from endowment. The amount to be distributed from temporarily restricted funds is determined annually by the donors and the Foundation.
Endowment Contributions Receivable

New pledges and planned gift intentions, when combined with the previously stated intentions of donors, create a pool of future assets in excess of $47.3 million as of March 31, 2016. The discounted value of unconditional contributions receivable recorded in the financial statements was $4.6 million as of March 31, 2016. Conditional contributions receivable are not recorded until such time as the conditions are substantially met. The Eleanor B. Daugherty Society recognizes donors during their lifetime who have chosen to support Chautauqua’s mission through a planned gift. Members are listed on pages 42 and 43.

March 31, 2016

<table>
<thead>
<tr>
<th>Contributions Receivable</th>
<th>Specified</th>
<th>Unspecified</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unconditional contributions receivable</td>
<td>$2,130,300</td>
<td>$9,133,626</td>
<td>$11,263,926</td>
</tr>
<tr>
<td>Conditional contributions receivable</td>
<td>25,480,803</td>
<td>10,580,345</td>
<td>36,061,148</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$27,611,103</strong></td>
<td><strong>$19,713,971</strong></td>
<td><strong>$47,325,074</strong></td>
</tr>
</tbody>
</table>

Unconditional contributions receivable as of March 31, 2016

<table>
<thead>
<tr>
<th>Contributions Receivable</th>
<th>Gross</th>
<th>Discount</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pooled Life Income Fund</td>
<td>$3,331,637</td>
<td>$1,741,779</td>
<td>$1,589,858</td>
</tr>
<tr>
<td>Irrevocable Trusts</td>
<td>6,703,485</td>
<td>4,761,970</td>
<td>1,941,515</td>
</tr>
<tr>
<td>Cash Pledges</td>
<td>1,228,804</td>
<td>120,502</td>
<td>1,108,302</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$11,263,926</strong></td>
<td><strong>$6,624,251</strong></td>
<td><strong>$4,639,675</strong></td>
</tr>
</tbody>
</table>

Conditional contributions receivable as of March 31, 2016

<table>
<thead>
<tr>
<th>Contributions Receivable</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bequests</td>
<td>$21,138,076</td>
</tr>
<tr>
<td>Retirement Plans</td>
<td>9,305,527</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>534,939</td>
</tr>
<tr>
<td>Revocable Trusts</td>
<td>5,082,606</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$36,061,148</strong></td>
</tr>
</tbody>
</table>
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. The committee’s oversight responsibilities cover $83.2 million in invested assets, comprised of the following portfolios:

1) Endowment ($74.2 million)
2) Temporarily restricted ($5.2 million)
3) Pooled life income fund ($3.3 million)
4) Custodial ($0.5 million)

Each portfolio is managed according to its specific objectives, and has a unique asset allocation appropriate to those objectives. Investment performance is presented on a net basis, defined as total time weighted return after all investment management fees.

Hirtle, Callaghan & Co., LLC serves as the Foundation’s Chief Investment Advisor and actively manages the majority of the endowment portfolio, the temporarily restricted funds, and the custodial funds. The remaining portion of the endowment fund is invested in two funds of hedge funds, managed by Blackstone Alternative Asset Management and Pointer Management, LLC. The pooled life income fund is managed by Key Private Bank.

During the fiscal year, the Investment Committee conducted a comprehensive review of proposals from other managers and ultimately decided to remain with Hirtle, Callaghan & Co., LLC.

1) Individual endowment funds are pooled for investment purposes and tracked with unit accounting. This pooled approach enables endowment funds to collectively benefit from the diversification and efficiencies that are available to larger investors. Each endowment fund receives its proportionate share of return based on the market value of the endowment as a percentage of the total market value of the investment portfolio. Hirtle, Callaghan & Co., LLC manages $57.6 million of the endowment and $16.6 million of the endowment is invested in the two funds of hedge funds.

2) Temporarily restricted funds are held and managed separately from permanently restricted endowment in one of two portfolios, employing conservative investment strategies. One portfolio is primarily held in cash and the other portfolio is invested in cash.

3) The management and investment strategy of the pooled life income fund (PLIF) is reviewed annually with Key Private Bank. At March 31, 2016, 35% of the PLIF assets were invested in equities, 56% in fixed income assets and 9% in alternative investments.

4) Funds held in custody for the Institution to meet the debt service for the Turner Community Center had a market value of $486,180 as of March 31, 2016. Assets are invested in a series of certificates of deposits.

Endowment Investment Portfolio

This chart represents the endowment investment portfolio in thousands, which has grown by $34.7 million over the past 15 years, from $39.5 million as of March 31, 2001 to $74.2 million as of March 31, 2016.
Endowment Asset Allocation 2016

Total endowment portfolio market value was $74.2 million and as of March 31, 2016 was allocated as shown in the accompanying table.

Annual Fiscal Year Performance

The Investment Committee takes a long term approach, over full market cycles, to assess the performance of the portfolio. The fiscal year ended March 31, 2016 was a challenging year for investment returns, producing a loss of 4.9%. The 10-year return surpassed the diversified benchmark in each of the preceding 3 years. This benchmark 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.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Return</td>
<td>6.2%</td>
<td>6.0%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Benchmark</td>
<td>5.7%</td>
<td>5.3%</td>
<td>3.4%</td>
</tr>
</tbody>
</table>
The Audit Committee reviewed and discussed the audited financial statements for the fiscal year ended March 31, 2016 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.

The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of March 31, 2016 and 2015, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

Management’s Responsibility for the Financial Statements
Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes 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.

Auditors’ Responsibility
Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors’ judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity’s preparation and fair presentation of the financial statements 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 entity’s internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion
In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Foundation as of March 31, 2016 and 2015 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.

June 21, 2016

Lumsden & McCormick, LLP
# Statements of Financial Position

### March 31, 2016

**Assets:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$312,259</td>
<td>$1,411,505</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>4,639,675</td>
<td>6,445,776</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>80,222,524</td>
<td>83,899,022</td>
</tr>
<tr>
<td>Property and equipment, net (Note 4)</td>
<td>37,038</td>
<td>43,122</td>
</tr>
<tr>
<td>Other assets</td>
<td>2,219,333</td>
<td>360,754</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$87,430,829</td>
<td>$92,160,179</td>
</tr>
</tbody>
</table>

**Liabilities and Net Assets:**

**Liabilities:**

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable to the Institution (Note 5)</td>
<td>$7,560,735</td>
<td>$2,422,721</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>446,721</td>
<td>726,585</td>
</tr>
<tr>
<td>Amounts held in custody for others (Note 6)</td>
<td>486,180</td>
<td>628,283</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>$8,493,636</td>
<td>3,777,589</td>
</tr>
</tbody>
</table>

**Net Assets (Note 7):**

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>3,888,034</td>
<td>11,102,357</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>9,516,117</td>
<td>13,135,705</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>65,533,042</td>
<td>64,144,528</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>78,937,193</td>
<td>88,382,590</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$87,430,829</td>
<td>$92,160,179</td>
</tr>
</tbody>
</table>

See accompanying notes.
# STATEMENTS OF ACTIVITIES

## For the year ended March 31, 2016

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash received:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>$</td>
<td>-</td>
<td>$ 3,707,326</td>
<td>$ 3,707,326</td>
</tr>
<tr>
<td>Endowment</td>
<td>49,062</td>
<td>39,087</td>
<td>3,089,754</td>
<td>3,177,903</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>2,247,794</td>
<td>-</td>
<td>2,247,794</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>(15,585)</td>
<td>-</td>
<td>(1,701,240)</td>
<td>(1,716,825)</td>
</tr>
<tr>
<td>Total contributions</td>
<td>33,477</td>
<td>5,994,207</td>
<td>1,388,514</td>
<td>7,416,198</td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>155,461</td>
<td>1,051,855</td>
<td>-</td>
<td>1,207,316</td>
</tr>
<tr>
<td>Net realized and unrealized losses</td>
<td>(548,464)</td>
<td>(4,020,678)</td>
<td>-</td>
<td>(4,569,142)</td>
</tr>
<tr>
<td>Total revenues</td>
<td>(359,526)</td>
<td>3,025,384</td>
<td>1,388,514</td>
<td>4,054,372</td>
</tr>
<tr>
<td><strong>Expenses:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support to the Institution:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>3,707,326</td>
<td>-</td>
<td>-</td>
<td>3,707,326</td>
</tr>
<tr>
<td>Endowment direct support</td>
<td>7,006,585</td>
<td>-</td>
<td>-</td>
<td>7,006,585</td>
</tr>
<tr>
<td>Support from other funds</td>
<td>1,068,953</td>
<td>-</td>
<td>-</td>
<td>1,068,953</td>
</tr>
<tr>
<td>Development (Note 6)</td>
<td>912,407</td>
<td>-</td>
<td>-</td>
<td>912,407</td>
</tr>
<tr>
<td>General and administrative</td>
<td>804,498</td>
<td>-</td>
<td>-</td>
<td>804,498</td>
</tr>
<tr>
<td>Total expenses</td>
<td>13,499,769</td>
<td>-</td>
<td>-</td>
<td>13,499,769</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>6,644,972</td>
<td>(6,644,972)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Change in net assets</td>
<td>(7,214,323)</td>
<td>(3,619,588)</td>
<td>1,388,514</td>
<td>(9,445,397)</td>
</tr>
<tr>
<td>Net assets - beginning</td>
<td>11,102,357</td>
<td>13,135,705</td>
<td>64,144,528</td>
<td>88,382,590</td>
</tr>
<tr>
<td>Net assets - ending</td>
<td>$ 3,888,034</td>
<td>$ 9,516,117</td>
<td>$ 65,533,042</td>
<td>$ 78,937,193</td>
</tr>
</tbody>
</table>

See accompanying notes.
## For the year ended March 31, 2015

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash received:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>-</td>
<td>$3,974,259</td>
<td>$</td>
<td>$3,974,259</td>
</tr>
<tr>
<td>Endowment</td>
<td>500,074</td>
<td>31,947</td>
<td>6,438,303</td>
<td>6,970,324</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>332,825</td>
<td></td>
<td>332,825</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>64,163</td>
<td>12,242</td>
<td>(1,882,427)</td>
<td>(1,806,022)</td>
</tr>
<tr>
<td>Total contributions</td>
<td>564,237</td>
<td>4,351,273</td>
<td>4,555,876</td>
<td>9,471,386</td>
</tr>
<tr>
<td>Interest and dividends</td>
<td>154,261</td>
<td>987,366</td>
<td>-</td>
<td>1,141,627</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>296,928</td>
<td>1,860,298</td>
<td>-</td>
<td>2,157,226</td>
</tr>
<tr>
<td>Total revenues</td>
<td>1,015,426</td>
<td>7,198,937</td>
<td>4,555,876</td>
<td>12,770,239</td>
</tr>
</tbody>
</table>

| **Expenses:**          |              |                        |                        |            |
| Support to the Institution: |          |                        |                        |            |
| Chautauqua Fund        | 3,974,259    | -                      | -                      | 3,974,259  |
| Endowment direct support | 1,953,231  | -                      | -                      | 1,953,231  |
| Support from other funds | 215,951   | -                      | -                      | 215,951    |
| Development (Note 6)   | 971,813      | -                      | -                      | 971,813    |
| General and administrative | 765,810  | -                      | -                      | 765,810    |
| Total expenses         | 7,881,064    | -                      | -                      | 7,881,064  |

| Net assets released from restrictions | 7,413,615 | -(7,413,615) | - | - |
| Change in net assets          | 547,977    | -(214,678)    | 4,555,876    | 4,889,175 |
| Net assets - beginning       | 10,554,380 | 13,350,383    | 59,588,652   | 83,493,415 |
| Net assets - ending          | $11,102,357 | $13,135,705   | $64,144,528  | $88,382,590 |

See accompanying notes.
For the years ended March 31, 2016 2015

### Operating activities:

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in net assets</td>
<td>$(9,445,397)</td>
<td>$4,889,175</td>
</tr>
<tr>
<td>Adjustments to reconcile change in net assets to net cash flows from operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net realized and unrealized (gains) losses</td>
<td>4,569,142</td>
<td>(2,157,226)</td>
</tr>
<tr>
<td>Depreciation</td>
<td>8,940</td>
<td>13,785</td>
</tr>
<tr>
<td>Changes in other operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>1,806,101</td>
<td>1,879,079</td>
</tr>
<tr>
<td>Other assets</td>
<td>(1,858,579)</td>
<td>1,219</td>
</tr>
<tr>
<td>Payable to the Institution</td>
<td>5,138,014</td>
<td>357,926</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>(279,864)</td>
<td>475,679</td>
</tr>
<tr>
<td>Amounts held in custody for others</td>
<td>(142,103)</td>
<td>(137,096)</td>
</tr>
<tr>
<td><strong>Net operating activities</strong></td>
<td>(203,746)</td>
<td>5,322,541</td>
</tr>
</tbody>
</table>

### Investing activities:

<table>
<thead>
<tr>
<th>Description</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchases of property and equipment</td>
<td>(2,856)</td>
<td>(6,992)</td>
</tr>
<tr>
<td>Purchases of investments</td>
<td>(12,428,412)</td>
<td>(17,964,925)</td>
</tr>
<tr>
<td>Proceeds from sales of investments</td>
<td>11,535,768</td>
<td>13,594,297</td>
</tr>
<tr>
<td><strong>Net investing activities</strong></td>
<td>(895,500)</td>
<td>(4,377,620)</td>
</tr>
<tr>
<td><strong>Net change in cash</strong></td>
<td>(1,099,246)</td>
<td>944,921</td>
</tr>
<tr>
<td>Cash - beginning</td>
<td>1,411,505</td>
<td>466,584</td>
</tr>
<tr>
<td><strong>Cash - ending</strong></td>
<td>$312,259</td>
<td>$1,411,505</td>
</tr>
</tbody>
</table>

See accompanying notes.
1. Summary of Significant Accounting Policies:

**Organization and Purpose:**
Chautauqua Foundation, Inc. (the Foundation) was established in 1937 to raise, invest and reinvest funds to support the mission of Chautauqua Institution (the Institution) to provide cultural, educational, religious and other programs to a large and diverse audience.

**Subsequent Events:**
The Foundation has evaluated events and transactions for potential recognition or disclosure through June 21, 2016, the date the financial statements were available to be issued.

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

**Investments:**
Investments in marketable securities are stated at fair value as determined by quoted prices in active markets. Alternative investments include investments in partnerships whose holdings consist primarily of funds of funds, and investments in limited partnerships that are reported at "estimated capital balances" determined by the investment managers.

To satisfy its long-term rate of return objectives, the Foundation relies on a total return strategy in which investment returns are achieved through both capital appreciation and current yield. The Foundation targets a diversified asset allocation that places a greater emphasis on equity-based investments to achieve its long-term return objectives within prudent risk constraints.

**Property and Equipment:**
Property and equipment is stated at fair market value at the date of donation or acquisition cost, net of accumulated depreciation. Depreciation is provided over estimated useful lives using the straight-line method.

Property held by the Foundation for which the intended use is not related to Foundation operations are included in other assets in the statements of financial position.

**Contributions:**
Contributions, including unconditional promises to give, are reported at fair value at the date received. Gifts are reported as restricted support if they are received with donor stipulations that limit their use. When a donor restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restriction.

Contributions that are expected to be collected in future years are recorded at net realizable value. The discounts on those amounts are computed using an interest rate applicable to the year in which the promise is received. Amortization of the discount is included in contributions revenue in the statements of activities.

Conditional promises to give to the Foundation or the Institution are not recorded as revenue until such time as the conditions are substantially met, and totaled $36,061,000 and $31,247,000 at March 31, 2016 and 2015.

**Support to the Institution:**
All Chautauqua Fund contributions are distributed to the Institution in the same year they are received by the Foundation. Annual distributions from the 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.

**Tax Status:**
The Foundation is a 501(c)(3) corporation exempt from income taxes under Section 501(a) of the Internal Revenue Code. The Foundation believes it is no longer subject to examination by Federal and State taxing authorities for years prior to 2013.

**Use of Estimates:**
The preparation of financial statements in conformity 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.

**Reclassifications:**
The financial statements for the year ended March 31, 2015 have been reclassified to conform with the presentation adopted for 2016.

2. Contributions Receivable:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pooled life income funds</td>
<td>3,331,637</td>
<td>3,671,043</td>
</tr>
<tr>
<td>Charitable remainder trusts</td>
<td>6,703,485</td>
<td>6,680,811</td>
</tr>
<tr>
<td>Unconditional promises to give</td>
<td>1,228,804</td>
<td>2,502,122</td>
</tr>
<tr>
<td>Estates</td>
<td>-</td>
<td>675,000</td>
</tr>
<tr>
<td>Less discount</td>
<td>11,263,926</td>
<td>13,528,976</td>
</tr>
<tr>
<td></td>
<td>6,624,251</td>
<td>7,083,200</td>
</tr>
<tr>
<td></td>
<td>4,639,675</td>
<td>6,445,776</td>
</tr>
</tbody>
</table>

Contributions receivable at March 31, 2016 are expected to be received over the periods shown below:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>409,144</td>
</tr>
<tr>
<td>One through five years</td>
<td>814,660</td>
</tr>
<tr>
<td>Greater than five years</td>
<td>10,040,122</td>
</tr>
<tr>
<td></td>
<td>11,263,926</td>
</tr>
</tbody>
</table>
3. Investments:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketable securities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$7,871,158</td>
<td>$4,565,966</td>
</tr>
<tr>
<td>Equities</td>
<td>37,791,242</td>
<td>44,108,500</td>
</tr>
<tr>
<td>Fixed income securities</td>
<td>10,620,491</td>
<td>11,511,322</td>
</tr>
<tr>
<td>Alternative investments</td>
<td>23,587,155</td>
<td>23,371,090</td>
</tr>
<tr>
<td>Other</td>
<td>352,478</td>
<td>342,144</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$80,222,524</td>
<td>$83,899,022</td>
</tr>
</tbody>
</table>

The underlying holdings within alternative investments include different types of sophisticated investment strategies with various liquidity restrictions.

Liquidity for alternative investments is as follows as of March 31:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redeemable semiannually with 75 to 105 days notice</td>
<td>$16,611,918</td>
<td>$17,053,592</td>
</tr>
<tr>
<td>Illiquid with return of capital allowed at varying dates during the period 2017 through 2026</td>
<td>6,975,237</td>
<td>6,317,498</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$23,587,155</td>
<td>$23,371,090</td>
</tr>
</tbody>
</table>

The Foundation has committed capital of approximately $15,480,000 to private equity alternative investments. The unfunded portion of the commitments total approximately $6,680,000 as of March 31, 2016.

Investment management fees of $599,881 and $606,601 for 2016 and 2015 are recorded in the statements of activities as follows:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees netted against interest and dividend income</td>
<td>$169,227</td>
<td>$186,732</td>
</tr>
<tr>
<td>General and administrative expense</td>
<td>430,654</td>
<td>419,869</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$599,881</td>
<td>$606,601</td>
</tr>
</tbody>
</table>

5. Payable to the Institution:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income and principal</td>
<td>$7,061,587</td>
<td>$1,998,994</td>
</tr>
<tr>
<td>Income from prior periods</td>
<td>499,148</td>
<td>423,727</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$7,560,735</td>
<td>$2,422,721</td>
</tr>
</tbody>
</table>

6. Other Transactions with the Institution:

Pursuant to an agreement between the Foundation and the Institution, the Foundation reimburses the Institution regularly for various personnel and administrative expenses. Additionally, the Foundation was reimbursed $350,000 in 2016 and 2015 by the Institution for development services the Foundation provided to the Institution. These amounts are included as a receivable in other assets and as a reduction of 2016 and 2015 development expenses in the accompanying statements of financial position and activities, respectively.

The Foundation guarantees a promissory note payable by the Institution totaling $670,245 at March 31, 2016. Amounts held by the Foundation on behalf of the Institution to help repay the note totaled $486,180 and $628,283 at March 31, 2016 and 2015.

On May 12, 2016, the Foundation obtained a $25,000,000 bank revolving credit note to facilitate financing the renovation of the Institution’s amphitheater. The note bears interest at the LIBOR flex rate plus 1%, and contains a covenant requiring the Foundation to maintain a minimum balance in marketable securities or cash of $25,000,000. Additionally, the Foundation provides a negative pledge on all of its assets, and the note is guaranteed by the Institution.

Pursuant to a promissory note entered into between the Foundation and Institution, all amounts advanced under the bank revolving credit note for the benefit of the Institution will be repaid to the Foundation with interest at the Internal Revenue Service’s applicable federal rate for mid-term borrowings.

7. Net Assets:

Unrestricted net assets include board-designated endowment funds and unrestricted gifts available upon request by the Institution. From time to time the market value of certain endowment funds is lower than the original gifted values due to investment experience. These amounts are included in unrestricted net assets as underwater funds.

The composition of unrestricted net assets is as follows:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board-designated endowments</td>
<td>$4,587,239</td>
<td>$10,223,041</td>
</tr>
<tr>
<td>Unrestricted funds</td>
<td>922,932</td>
<td>916,748</td>
</tr>
<tr>
<td>Underwater funds</td>
<td>(1,622,137)</td>
<td>(37,432)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$3,888,034</td>
<td>$11,102,357</td>
</tr>
</tbody>
</table>
Temporarily restricted net assets are comprised of unappropriated endowment gains and restricted gifts as follows:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$3,913,661</td>
<td>$7,418,091</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>$1,205,946</td>
<td>$2,421,404</td>
</tr>
<tr>
<td>Term endowments</td>
<td>$2,498,729</td>
<td>$2,853,456</td>
</tr>
<tr>
<td>Temporarily restricted gifts</td>
<td>$1,897,781</td>
<td>$442,754</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$9,516,117</strong></td>
<td><strong>$13,135,705</strong></td>
</tr>
</tbody>
</table>

Permanently restricted net assets represent the accumulated principal of endowment gifts that have been restricted by donors to be maintained by the Foundation in perpetuity. Permanently restricted net assets are comprised of the following endowment gift categories:

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$44,813,173</td>
<td>$43,268,671</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>$20,719,869</td>
<td>$20,875,857</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$65,533,042</strong></td>
<td><strong>$64,144,528</strong></td>
</tr>
</tbody>
</table>

8. **Retirement Plan:**
The Foundation participates in a 403(b) retirement plan for substantially all employees, subject to plan conditions. The Foundation contributes 10% of the employee's gross pay each year. Funded contributions and costs totaled $72,000 and $80,000 for the years ended March 31, 2016 and 2015.

9. **Fair Value Measurements:**
Investments in marketable securities are measured at fair value on a recurring basis on the statements of financial position. The fair value for marketable securities at March 31, 2016 and 2015 were determined based on quoted prices in active markets.

Note continued on next page.

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**LEWIS MILLER COTTAGE**

When the historic Lewis Miller Cottage, located in Miller Park, was placed on the market there were many who thought that the logical next owner of this unique home was the Institution. One person stepped forward and made that possible. Longtime Chautauquan, preservationist and philanthropist Tom Hagen was keen on preserving the former home of one of the Institution’s co-founders Lewis Miller, and later Miller’s daughter Mina and her husband, Thomas Edison.

Lewis Miller Cottage, built in 1875, was designated a National Historic Landmark in 1966. Hagen recognized the unique appropriateness of the Institution owning the only remaining founder’s cottage, directly across from where the Assembly first met, and decided to donate the funds to allow the Chautauqua Foundation to purchase the house from then-owners and Miller descendants, Ted Arnn and Kim Arnn.

For 141 years the cottage had remained in one family and undergone only one major renovation in the early 1920’s by Mina Miller Edison. Much of the cottage remains as it was then including the furniture, finishes and fixtures. Impeccably cared for and maintained over the years by Lewis Miller’s heirs, the cottage stands as a tangible connection to Chautauqua’s history.

**EVERY GIFT MATTERS**
10. Endowment Assets:
The Foundation’s endowment assets are comprised of board-designated endowment, term endowments and donor restricted endowments to be held in perpetuity. 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 direct and indirect support to the Institution, as well as for Foundation general and administrative expenses, total spending typically ranges from 3% to 6.5% of the beginning of year market value of the Foundation’s endowment assets. Distributions from the board-designated endowment funds are made at the discretion of the Foundation’s Board.

The Foundation’s Board has interpreted the New York State 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 permanently restricted net assets (a) the original value of gifts donated to the permanent endowment, (b) the original value of subsequent gifts to the permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of a donor gift instrument at the time the accumulation is added to the fund.

In accordance with NYPMIFA, the Foundation considers the following factors to appropriate or accumulate donor restricted endowment funds:

- Duration and preservation of the fund
- Purposes of the Foundation and the fund
- General economic conditions
- Possible effects of inflation and deflation
- Expected total return from income and appreciation of investments
- Other Foundation resources
- Where appropriate and circumstances would otherwise warrant, alternatives to expenditure of the endowment fund, giving due consideration to the effect that such alternatives may have on the Foundation
- Investment policy of the Foundation

Investment activity is allocated among the endowment assets based upon their proportionate share of the investment portfolio. Investment activity related to the board-designated endowment is shown as an increase (decrease) in unrestricted net assets. Investment income related to the donor-restricted and term endowments is reported as an increase (decrease) to temporarily restricted net assets until appropriated in accordance with the Foundation’s spending policy. The Foundation’s endowment assets activity for the years ended March 31, 2016 and 2015 is as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Unrestricted (Board-designated)</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$10,223,041</td>
<td>$12,692,951</td>
<td>$64,144,528</td>
<td>$87,060,520</td>
</tr>
<tr>
<td></td>
<td>Investment income:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Interest and dividends</td>
<td>$139,700</td>
<td>$1,047,863</td>
<td>1,187,563</td>
</tr>
<tr>
<td></td>
<td>Net losses</td>
<td>(543,668)</td>
<td>(4,005,492)</td>
<td>(4,549,160)</td>
</tr>
<tr>
<td></td>
<td>Total investment loss</td>
<td>(403,968)</td>
<td>(2,957,629)</td>
<td>(3,361,597)</td>
</tr>
<tr>
<td></td>
<td>Contributions</td>
<td>33,477</td>
<td>255,451</td>
<td>288,928</td>
</tr>
<tr>
<td></td>
<td>Appropriated</td>
<td>(5,265,311)</td>
<td>(2,372,437)</td>
<td>(7,637,748)</td>
</tr>
<tr>
<td></td>
<td>Endowment assets - end of year</td>
<td>$4,587,239</td>
<td>$7,618,336</td>
<td>$12,205,575</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Unrestricted (Board-designated)</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$9,710,286</td>
<td>$12,814,510</td>
<td>$59,588,652</td>
<td>$82,113,448</td>
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<td></td>
<td>Investment income:</td>
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</tr>
<tr>
<td></td>
<td>Interest and dividends</td>
<td>$142,383</td>
<td>984,396</td>
<td>1,126,779</td>
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<tr>
<td></td>
<td>Net gains</td>
<td>278,023</td>
<td>1,860,727</td>
<td>2,138,750</td>
</tr>
<tr>
<td></td>
<td>Total investment income</td>
<td>420,406</td>
<td>2,845,123</td>
<td>3,265,529</td>
</tr>
<tr>
<td></td>
<td>Contributions</td>
<td>564,237</td>
<td>31,947</td>
<td>596,184</td>
</tr>
<tr>
<td></td>
<td>Appropriated</td>
<td>(471,888)</td>
<td>(2,998,629)</td>
<td>(3,470,517)</td>
</tr>
<tr>
<td></td>
<td>Endowment assets - end of year</td>
<td>$10,223,041</td>
<td>$12,692,951</td>
<td>$87,060,520</td>
</tr>
</tbody>
</table>
The Board of Directors
Chautauqua Foundation, Inc.

We have audited the financial statements of Chautauqua Foundation, Inc. as of and for the years ended March 31, 2016 and 2015 and have issued our report thereon dated June 21, 2016 which expressed an unmodified opinion on those financial statements. Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The schedules of expenses for the years ended March 31, 2016 and 2015 are presented for the purposes of additional analysis and are not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audits of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

June 21, 2016

INDEPENDENT AUDITORS’ REPORT ON ADDITIONAL INFORMATION

<table>
<thead>
<tr>
<th>For the years ended March 31,</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Support to the Institution:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauka Fund</td>
<td>$3,707,326</td>
<td>$3,974,259</td>
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<tr>
<td><strong>Endowment direct support:</strong></td>
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<td></td>
</tr>
<tr>
<td>Capital</td>
<td>$5,000,000</td>
<td>$-</td>
</tr>
<tr>
<td>Building, structures and grounds</td>
<td>330,785</td>
<td>307,914</td>
</tr>
<tr>
<td>General operations</td>
<td>11,754</td>
<td>5,101</td>
</tr>
<tr>
<td>Lectureship and CLSC</td>
<td>636,191</td>
<td>616,578</td>
</tr>
<tr>
<td>Performing arts</td>
<td>559,418</td>
<td>564,054</td>
</tr>
<tr>
<td>Religion</td>
<td>196,056</td>
<td>188,947</td>
</tr>
<tr>
<td>Scholarship and youth</td>
<td>272,381</td>
<td>270,637</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$7,006,585</td>
<td>$1,953,231</td>
</tr>
<tr>
<td><strong>Support from other funds:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capital</td>
<td>$800,018</td>
<td>$29,166</td>
</tr>
<tr>
<td>General operations</td>
<td>141,733</td>
<td>74,047</td>
</tr>
<tr>
<td>Lectureship and CLSC</td>
<td>41,882</td>
<td>52,672</td>
</tr>
<tr>
<td>Performing arts</td>
<td>-</td>
<td>25,000</td>
</tr>
<tr>
<td>Religion</td>
<td>80,012</td>
<td>26,626</td>
</tr>
<tr>
<td>Scholarship and youth</td>
<td>5,308</td>
<td>8,440</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$1,068,953</td>
<td>$215,951</td>
</tr>
<tr>
<td><strong>Development:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and benefits</td>
<td>$906,201</td>
<td>$872,862</td>
</tr>
<tr>
<td>Promotion and communications</td>
<td>89,411</td>
<td>148,990</td>
</tr>
<tr>
<td>Office</td>
<td>44,517</td>
<td>32,276</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>141,219</td>
<td>176,996</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>52,472</td>
<td>58,750</td>
</tr>
<tr>
<td>Equipment maintenance and repairs</td>
<td>20,250</td>
<td>25,822</td>
</tr>
<tr>
<td>Education</td>
<td>8,337</td>
<td>6,117</td>
</tr>
<tr>
<td>Reimbursement by the Institution</td>
<td>(350,000)</td>
<td>(350,000)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$912,407</td>
<td>$971,813</td>
</tr>
<tr>
<td><strong>General and administrative:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment management</td>
<td>$430,654</td>
<td>$419,869</td>
</tr>
<tr>
<td>Salaries and benefits</td>
<td>245,753</td>
<td>234,825</td>
</tr>
<tr>
<td>Office</td>
<td>12,926</td>
<td>12,160</td>
</tr>
<tr>
<td>Travel and hospitality</td>
<td>49,216</td>
<td>38,042</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>40,260</td>
<td>40,065</td>
</tr>
<tr>
<td>Equipment maintenance and repairs</td>
<td>22,132</td>
<td>18,607</td>
</tr>
<tr>
<td>Education</td>
<td>3,557</td>
<td>2,242</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$804,498</td>
<td>$765,810</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>$13,499,769</td>
<td>$7,881,064</td>
</tr>
</tbody>
</table>
ENDOWMENT FUNDS

UNSPECIFIED FUNDS
$23,595,474 Assets
$919,904 Support to the Institution

* Income and principal may be distributed

New funds are designated in orange.

Paul M. Alexander Fund *
Dorothy L. Anderson Endowment for Chautauqua *
Mary Apple Fund *
Arthur S. & Barbara F. Banner Endowment for Chautauqua
Robert and Je'Anne Bargar Endowment
Zoe and Ken Barley Endowment
Beatrice B. Bates Fund
Julia M. Bates Fund *
Nancy and Dick Bechtolt Fund
Thomas and Jane Becker Endowment
Bemus Fund for Chautauqua
Gordon Benn Fund
Alan J. and Mary Hough Blair Fund
Cora M. Blair Fund *
The Erika Block Fund for Chautauqua *
Martha Borowsky Endowment Fund
Bosland Family Fund
Boyle Family Fund
Barbara A. and Patrick James Brady III Endowment for Chautauqua
Sara E. Bradley Endowment for Chautauqua
Barbara and William Branch Fund
Daniel and Wanita Bratton Endowment
Lillian Brink Endowment Fund
Gary M. and Willow R. Brost Endowment for Chautauqua
Henrietta T. Campbell Fund
Maxine M. Carleton Fund
Katharine J. Carnahan Endowment
Barbara P. and Howard E. Chadwick Fund
Genevieve Chaney Fund
Julia and William Clinger Fund
Marion and Eugene Cohen Fund
Ruth K. Collyer Endowment
Jack and Marcia Connolly Fund for Chautauqua
The Mildred K. Cooper Fund for Chautauqua *
Helen and George L. Cornell Fund *
Katharine and Robert W. Cornell Fund *
Sarah A. Corns Fund
Martha S.H. Cowles Fund

Helen T. and Ralph E. Crockett Endowment
Laura and Brad Currie Endowment for Chautauqua
Elizabeth Danielson Fund
Dietrich Family Endowment at Chautauqua
Martha T. and Morgan O. Doolittle Fund
Lora Lee and Bob Duncan Endowment
Ann O. Edison Endowment *
Albert C. Elser II Fund
Cordelia C. Ensign Fund
James E. Erickson Fund *
Helen C. Estabrook Fund
Agnes H. and Hal A. Fausnagh Fund
Fetterolf Family Fund
George L. Follansbee, Jr. and Gay E. Didget 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
Heber R. Harper Fund
Eleanor McKnight Haupt Endowment for Chautauqua
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
Katherine King Karslake Fund
Ronald L. and Rosie C. Kilpatrick Endowment
Georgiana Bole King Endowment
The Lawrence G. Knecht Fund *
Knox Family Endowment
Konneker Fund
Mary E. Kuhns Fund
Velma Jean Laird Endowment *
Oliver M. Langenberg Fund *
Robert and Susan Laubach Endowment
LeClere Family Endowment
The Lemonade Fund
Elizabeth S. & Reginald A. Lenna Fund
Stella C. Logan Fund
William Charles Lortz Endowment *
Sara M. and Robert S. Lucas Fund
Stan and Sara Lundine Fund
Lyndall Family Fund
Ann and Charles H. Lytle Endowment
Jeannette B. Mainwood Fund
Gerald and Dorothea Maloney Endowment
Clara Masik Endowment
Mary E. McCarn Fund *
Mary Jane and Donald McClurg Endowment
Margaret C. Mercer Endowment
Richard H. Miller Fund
Dawson E. 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
Robert B. and June A. Osburn Fund
Robert Pace Endowment Fund
Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
William H. and Mary C. Park Fund
Mary Lou Cady Parlato Endowment for Chautauqua
Dorothy Payne Endowment Fund *
Charles E. and Gladys W. Peirce Fund
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
Mary Oram Reading Fund
Agnes H. Reigart Fund *
Elaine Y. Rieser Endowment for Chautauqua
William Rittman Fund *
Mary Ritts Endowment
Walter Roberts Fund
Doris H. Ruslink Fund *
Harper G. and Blanche Billings Rusterholtz Fund
Herbert B. Sachse Fund *
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 Schweizer Endowment for Chautauqua
Jo and Bill Selnick Fund *
Emma O. and H. Parker Sharp Fund
Jane R. and Walter C. Shaw, Jr. Fund
Ralph C. Sheldon, Jr. Fund
Dorothy E. Shepherd Fund *
Bert W. and Joanne R. Simons Endowment
J. Vance Smith and Robert M. Smith Fund
George T. and Margaret D. Snyder Endowment for Chautauqua
Nancy Coburn Snyder Endowment Fund
Thomas H. and Joan Stevens Family Endowment for Chautauqua
Betty P. and J. Bruce Stromgren Fund *
Ann H. and Daniel F. Sullivan Endowment for Chautauqua
The Robert C. and Patricia D. Switzer Family Fund
Tate Family Fund
Eleanor M. Thomas Fund
The Susan and John Turben Foundation Endowment for Chautauqua
Joseph & Elizabeth Verlie Endowment
Carl A. and Mary Louise Viehe Family Endowment
Nina and Norman Wain Family Endowment for Chautauqua
Evelyn Wargo Endowment
Nina T. Wensley Fund
Helen N. White Fund
Robert O. Wilder Family Fund *
The Mary S. Wilsdon Fund 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

$48,483,492 Assets  
$1,999,078 Support to the Institution

New funds are designated in orange.

## PHYSICAL MAINTENANCE FUNDS

$7,911,571 Assets  
$325,539 Support to the Institution

<table>
<thead>
<tr>
<th>Buildings and Structures</th>
<th>$6,490,812 Assets</th>
<th>$267,043 Support to the Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amphitheater Endowment Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bellinger Hall Maintenance Endowment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Francis and Susan Bonsignore Youth Facilities Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bratton Theater Endowment Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carnahan-Jackson Endowment for Dance Studio Maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Opera Guild Endowment for Connolly Residence Hall</td>
<td></td>
<td></td>
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<tr>
<td>Children's School Fund</td>
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<tr>
<td>The CLSC Class of 2000 Mosaic Fund</td>
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</tr>
<tr>
<td>Mary E. Collier Memorial Fund</td>
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<tr>
<td>Connolly Residence Hall Endowment</td>
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</tr>
<tr>
<td>Coyle Pavilion Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crowder Family Foundation Fund for Youth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department of Religion Physical Facilities Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mina Miller Edison Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Dorothy J. Forney Memorial Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fowler-Kellogg Art Center Endowment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Joseph and Anna Gartner Foundation Endowment for Bonnefous-McBride Hall</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Golf Course Maintenance and Growth Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Seth A. and Helen F. Goodwin Fund to Maintain the Pier Building</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hagen-Wensley Guest House Endowment</td>
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<td></td>
</tr>
<tr>
<td>Helen Heinz Sample Fund</td>
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<td></td>
</tr>
<tr>
<td>Hitchcock Room Maintenance Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Forest B. Irwin Fund for Bowling Green Maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Knox Fund for Youth Facilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elizabeth S. Lenna Hall Endowment Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Helen Colvill Lincoln Fund to Maintain Lincoln Memorial Dormitory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Massey Memorial Organ Fund</td>
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<td>The McClure Shuffleboard Fund</td>
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<tr>
<td>McKnight Hall Maintenance Endowment</td>
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</tr>
<tr>
<td>Kimberly and Robert Myers Dance Facilities Endowment</td>
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<tr>
<td>The Oliver Archives Center Endowment Fund</td>
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<tr>
<td>The I. Hale and Judy Oliver Fund for Bratton Theater</td>
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<tr>
<td>The Rait Family Fund</td>
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<tr>
<td>The Ann Simpson Rice Youth Fund</td>
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<tr>
<td>School of Music Facilities Endowment</td>
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<tr>
<td>The Sharpe/Trefts Memorial Fund</td>
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<tr>
<td>Strohl Center Endowment</td>
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<td>The Susan and John Turben Fund for Bratton Theater</td>
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<td>The Sybil and Stuart Willen Fund for Bratton Theater Youth Facilities Fund</td>
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## Specific Gardens and Parks

$946,735 Assets  
$38,444 Support to the Institution

<table>
<thead>
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<th>Specific Gardens and Parks</th>
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<tbody>
<tr>
<td>The Reid B. Babcox Memorial Garden Terrace Endowment</td>
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<td>The Bell/Ritts Garden Fund</td>
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<tr>
<td>Arline and Ralph Bernstein Memorial Rain Garden Fund</td>
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<td>The Bishop’s Garden Fund</td>
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<td>Selina W. Braham Memorial Garden Fund</td>
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<td>Judge W. Walter Braham Garden Fund</td>
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<td>Dr. Daniel and Wanita Bratton Garden Fund</td>
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<td>The Henrietta T. Campbell Garden Fund</td>
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<td>Carnahan-Jackson Memorial Garden Fund</td>
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<td>The Carothers Family Garden Fund</td>
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<td>The Kirk David Casto Memorial Garden Fund</td>
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<td>Jean Chadwick Memorial Garden Fund</td>
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<td>The CLSC Class of 1982 Helen W. Giacobine Garden Fund</td>
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<td>Connolly Family Gardens and Fountains Endowment</td>
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<td>The Cornell Garden Fund</td>
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<td>DeeDee’s Garden Endowment</td>
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<td>The Mary Kimball Haker Memorial Garden Endowment Fund</td>
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<td>The Holden Garden Fund</td>
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<td>Patricia K. Ives Memorial Beautification Fund</td>
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<td>Melvin Johnson Sculpture Garden Endowment</td>
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<td>Henrietta Ord Jones Memorial Fund</td>
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<td>The JoAnn Jubell Memorial Fund</td>
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<td>The Judson Park Fund</td>
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<td>Ryan Kiblin Memorial Stormwater Park Endowment</td>
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<td>Janet F. and Arthur C. LeVan, Sr. Garden Fund</td>
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<td>Joan Lincoln Garden Fund</td>
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<td>The Wilfred B. McCune Memorial Garden Fund</td>
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Mary Louise Molyneaux Garden Fund
Penneys Garden Endowment
Ride/Savage Memorial Garden Fund
The Michael M. Ross Garden Fund
The Mme. Shao Fang Sheng Garden Fund
Toni Sperman Memorial Garden
The Stephen Toms Garden Fund
Randall E. Widrig Memorial Garden 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
$474,024 Assets
$20,052 Support to the Institution
D.A.R. Flag Fund
Garden Beautification Fund
Lake, Grounds, and Public Spaces Endowment
Louise Marshall Lincoln Memorial Garden Fund
The Constance Lincoln Newbury Memorial Garden Fund
The Walter C. Shaw, Jr. Family Tree Fund
Tree Fund

EDUCATION & YOUTH FUNDS
$11,143,233 Assets
$452,856 Support to the Institution

Lectureships
$8,245,910 Assets
$339,299 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 Bellow Lectureship
Berglund-Weiss Lectureship Fund
June and Albert Bonjour 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 Chip and Gail Gamble Lecture Endowment
Barbara A. Georgescu Lectureship Endowment
The Charles Ellsworth Goodell Lectureship in Government and Public Affairs
The Susan Hirt Hagen Lectures Fund
The Thomas L. Hagner and Linda Ulrich-Hagner Lectureship Fund
Travis E. and Betty J. Halford Lectureship Endowment
The Dr. Robert R. Hesse Lectureship
The Higie Family Lectureship
The Robert Jacobs Memorial Lectureship Fund
Richard W. and Jeannette D. Kahlenberg Lectureship Fund
The Kevin and Joan Keogh Family Fund
Barbara and Herb Keyser Fund
Donald West King, Sr. and Francis Lila Lee King Lectureship
The Oliver and Mary Langenberg Lectureship
The Reginald and Elizabeth Lenna Lectureship in Business and Economics
The Helen C. Lincoln Fund for International Programming
The Louise Roblee McCarthy Memorial Lectureship
McCreedie Family Fund
National Endowment for the Humanities Fund
Joseph A. Neubauer Lectureship in Science
Margaret Miller Newman Lectureship Fund
Deloras K. and L. Beaty Pemberton Lectureship
Kathryn Sisson Phillips Memorial Lectureship Fund
The Richard and Emily Smucker Endowment Fund
The Frank G. Sterritt Lectureship
The Ethel Paris and Theodore Albert Viehe Lectureship
John M. Wadsworth Lectureship on Free Market and Libertarian Principles
The Dorothy M. Wissel Lectureship

Literary Arts
$1,277,610 Assets
$54,997 Support to the Institution
The Baird-Fuller Memorial Fund
Caroline Roberts Barnum and Julianne Barnum Follansbee Fund
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
C.L.S.C. Class of 1940 Endowment Fund
C.L.S.C. Class of 1948 Endowment Fund
Court Family Endowment for the Literary Arts
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
Smith Memorial Library Fund

Youth Activities
$537,221 Assets
$23,664 Support to the Institution
Ward T. Bower Youth Activities Memorial
Elizabeth Elser Doolittle 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
The Laurence and Maria Wagner Family Fund
Youth Activities Fund

Other
$1,082,492 Assets
$34,896 Support to the Institution
Lillian Brink Education Fund
Emily and Richard Smucker Directorship for Education

FINE & PERFORMING
ARTS FUNDS
$13,522,240 Assets
$559,342 Support to the Institution

General
$2,656,728 Assets
$111,728 Support to the Institution
The John T. and Katherine G. Bailey Family Fund
The Boyle Family Fund for the Performing Arts
Emily McKnight Corry Endowment for the Performing Arts
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
$3,871,128 Assets
$153,749 Support to the Institution
A. Chace & Josephine B. Anderson Opera Endowment Fund
John E. Anderson Opera Endowment
The Peggy and Andy Anderson Family Fund for Opera
The Cynthia Auerbach Fund for Opera
Bemus Endowment for Opera
Anne and John Burden Opera Fund
Chautauqua Opera Endowment Fund
The Chautauqua Opera Guild Endowment
Thomas and Kathleen Clingan Fund for Opera
The Connolly Family Fund For Opera
The John A. and Emily McKnight Corry Opera Fund
The Barbara Baldwin DeFrees Opera Fund
The Walter F. Ferchen Opera Fund
The Eleanor B. Franks Fund for the Opera
The James and Elisabeth Groninger Fund for Opera
The Jane A. Gross Opera Endowment
The Kay Frantz Israel Fund for Opera
The Mildred Lesenger Fund for Opera
The Kay H. Logan Opera Fund
The Annette Pickens Malvin Memorial Fund for Opera
The Christopher and Susan Martin Opera Fund
The Margaret Clark Mercer Fund for Opera
The Ralph E. Miller and Paul E. Caiewin Fund for Opera
The Steve Z. and Mary G. Mitchell Family Fund
The Reverend Lloyd V. Moffett Opera Endowment Fund
The Robert G. and Lilian 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
$3,784,685 Assets
$159,774 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
Shirley A. and Arthur R. Duffy Endowment for Classical Guitar
William D. Kuhns Fund for General Music Purposes of Chautauqua Institution
The Jim and Lynn Levinson Fund for the Chautauqua Symphony Orchestra
Helen T. Logan Fund for the Chautauqua Symphony Orchestra
Mr. & Mrs. Sam A. Miller and Mr. & Mrs. Edward S. Babcox Memorial Fund
The Mischakoff/Taylor Concertmaster Chair Fund
Margaret Miller Newman Fund for the Chautauqua Symphony Orchestra
The David B. and Barbara Barrett Orr Music Fund
The Reinberger Fund for the Performing Arts
The Gertrude Aldredge Shelburne Fund
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
Mary E. Whitaker Symphony Fund
Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra

Dance
$1,106,911 Assets
$47,647 Support to the Institution
The Paul and Toni Branch Fund for Dance
Carnahan-Jackson Dance Chair Endowment
The Carnahan-Jackson Dance Endowment
Dakin Family Fund for Dance
Terrie Vaile Hauck Dance Endowment
Moore Fund for Dance

Visual Arts
$1,644,566 Assets
$67,954 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
 Susan and John Turben Director of the VACI Galleries Endowment

RELIGION FUNDS
$4,877,463 Assets
$198,364 Support to the Institution

General
$1,252,022 Assets
$54,673 Support to the Institution
Campbell Department of Religion Fund
Eleanor B. Daugherty Fund
Department of Religion Fund
Department of Religion Leadership Fund
Carrell Leiper Hall Memorial Fund in Honor of Dr. Henry Smith Leiper
Lois Raynow Department of Religion Fund
The Waasdorp Fund for Religious Initiatives

Chaplaincies
$988,754 Assets
$37,841 Support to the Institution
Marie Reid-Edward Spencer Babcox Memorial Fund
Gladys R. Brasted and Adair Brasted Gould Memorial Chaplaincy
Robert D. Campbell Memorial Chaplaincy
Daney-Holden Chaplaincy Fund
The Mr. and Mrs. William Uhler Follansbee Memorial Chaplaincy
J. Everett Hall Memorial Chaplaincy
Samuel M. and Mary E. Hazlett Memorial Fund

Theater
$458,222 Assets
$18,490 Support to the Institution
The Arnold and Jill Bellowe Fund for Theater
The Nancy E. Brewer Fund for Theater
Chautauqua Theater Fund
The Crockett Family Fund for Theater
The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming
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

Dance
$1,106,911 Assets
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The Carnahan-Jackson Dance Endowment
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Terrie Vaile Hauck Dance Endowment
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Helen Moe Fund for Theater
The Florence and Cynthia Norton Fund for Theater
The Phoebe Wagner Ott Theater Fund
E N D O W M E N T  F U N D S  (C O N T . )

Jackson-Carnahan Memorial Chaplaincy
Alison and Craig Marthinsen Endowment for the
Department of Religion
The Geraldine M. and Frank E. McElree, Jr. Chaplaincy Fund
Randell-Hall Memorial Chaplaincy
Harold F. Reed, Sr. Chaplaincy
Edmond E. Robb-Walter C. Shaw Fund
John William Tyrrell Endowment for Religion

Religious Initiatives Fund
The Ann Simpson Rice Flower Fund
The Allen Steere, Sr. Fund for the Department of Religion

S C H O L A R S H I P  F U N D S
$6,011,751 Assets
$253,459 Support to the Institution

A. Chace Anderson Fine and Performing Arts Scholarship
Peggy and Andy Anderson Family Scholarship Fund
Richard W. Antemann Memorial Scholarship
Barakat Scholarship
The Michael L. Barnett Scholarship Fund
Bell Tower Scholarship Fund
The Jill W. Bellowe Chautauqua Conservatory Theater Scholarship
The Chuck Berghinc Scholarship
Dr. and Mrs. Arthur E. Bestor Scholarship Fund
The Frances Black Scholarship Fund
The Margaret B. Blossom Scholarship
Bonnefous/McBride Dance Scholarship
June and Albert Bonyor Scholarship Fund for Ballet
Alexander W. Bouchal Memorial Scholarship
Ward T. Bower Memorial Scholarship
Frederick Percival Boynton Scholarship
JoAnn and Gene Buffo Voice Scholarship
Lowell and Frances Hyam Brentano Fund
The Anne C. Britton Memorial Scholarship
The Charles and Ethel Brody Theater Scholarship
The Gladys Brooks Scholarship Endowment Fund
The Indiana-Peggy Hoover Voice Scholarship
Shirley Budke Memorial Fund for Blind Students
The Edwin L. Bullock Scholarship
The Lillian B. Bullock Scholarship
Burden-Staples Music Scholarship
Bennett and Mary Jo Burgoon Memorial Scholarship
The Andrew L. and Gayle Shaw Camden Fund for Theater Arts
The Carnahan-Jackson Scholarship Fund
The Chautauqua Art Scholarship
The Chautauqua Golf Club Scholarship Fund
The Chautauqua Theater Scholarship
The Chautauqua Voice Scholarship
Clark Scholarship Fund
Joseph Clarke Scholarship Fund
Clarkson Family Scholarship
The Theodore R. Colborn Scholarship
The William Cole/King Scholarship
Beverly and Bruce Conner Scholarship Fund
James and Barbara Copeland Scholarship Fund

Lectureships
$1,223,270 Assets
$53,872 Support to the Institution
Carnahan-Jackson Religious Lectureship
The Jack and Elizabeth Gellman and Zaretsky Family Fund
The Ralph W. Loew Religious Lectureship Fund
Robert S. and Sara M. Lucas Religious Lectureship
Eileen and Warren Martin Lectureship Fund for Emerging Studies in Bible and Theology
Eugene Ross McCarthy Memorial Fund
Rachel Alice Miller Memorial Fund
The Presbyterian Association of Chautauqua Religious Lectureship Fund
Arthur and Helen Reycroft Memorial Religious Lectureship Fund
Gertrude Elser Schroeder Fund
The H. Parker and Emma O. Sharp Lectureship Fund
Rabbi Samuel and Lynn Stahl Lectureship for the Understanding of Judaism

Other
$1,413,417 Assets
$51,978 Support to the Institution
Alice A. Allen Fund
John E. Anderson Religion Endowment
The Reverend Noel A. Calhoun, Jr., D.D. Fund
Campbell Department of Religion Audio-Visual Fund
Joan Brown Cambell Department of Religion Endowment
The Chautauqua Fund for Sacred Music
Fund for the Exploration of World Religions and Spiritual Practices
The Jack and Gretchen Grigsby Fund for Choral Enrichment
The Holden-Daney Fellowship Fund
Dr. William N. Jackson Religious Initiative Fund
Arville G. Light, Jr. Fund for Religion
The Myra Baker Low and Katharine Low Hembree Family Fund
S.R. and Jennie Hamill McClure Family Fund
The William H. and Mary C. Park Religious Programming Fund
Harold F. and Mary Lou E. Reed Family Fund
The Reeve Family Choir Music Fund
The Bettsy and Ellis Cowling Scholarship for Music
The Daley Family Fund
Eleanor B. Daugherty Scholarship Fund
Diamond Jubilee Class of 1948 Scholarship
Mary Lowe Dickinson Scholarship
Dietrich Family Endowment for Music at Chautauqua
The Mardelle Dressler Dobbins Scholarship
The Rachel W. Eaton Scholarship
The Bina Edkin Eckerd Memorial Fund for the Fine and Performing Arts
The Robert Hunt and Mary Campbell Eckhardt Memorial Scholarship
David and Miriam Yanes Eddleman Voice Scholarship
The Michael and Jane Eisner Dance Scholarship
Mary Cummings Paine Eudy Scholarship
The Falk Scholarship Fund
Family Scholarship Endowment
The Agnes H. and Hal A. Fausnaugh Chautauqua Conservatory Theater Scholarship
Beverly and Marvin Fiegelman Scholarship Fund for the Performing Arts
Genevieve Foote Findley Scholarship
Ted and Deborah First Scholarship
Edith Reid Flaster Memorial Dance Scholarship
The Luella Morris Forney Memorial Scholarship
Wilbur D. Forney Memorial Scholarship Fund
Dr. Stephen Fudell Memorial Scholarship Endowment
The Harriet B. and Ralph T. Geller Memorial Scholarship
Marjorie Geller Memorial Dance Scholarship
The Elizabeth & Jack Gellman and Deborah & Allen Zaretsky Scholarship Fund
General Scholarship Fund
The Howard G. Gibbs Scholarship Fund
Sheila Gitlitz Scholarship Endowment
The Gitlitz Scholarship Fund for Visual Arts
Glendorn Foundation Scholarship Fund
Golay-Bradford Endowment for Families
The Rosalyn Goldberg Scholarship Fund
The Toni and Joseph Goldfarb Scholarship Fund for Fine & Performing Arts
The Alfred E. Goldman Scholarship
The Jessie D. Grassie Class of 1882 Scholarship
Franklin P. & Fern Green and William P. & Ruth Bates Art Scholarship
The Groff-Simpson Family Scholarship
Grover Family Scholarship Fund
G. Thomas & Kathleen Harrick Music Scholarship
Harris Scholarship for Performing Arts
Ruth Higby Haver and Della and David Higby Music Scholarship
Lillian B. Hersh Music Scholarship
William and Pauline Higby School of Dance Scholarship
William and Pauline Higby School of Music Scholarship
Robert D. Hiller Scholarship Fund
The Arthur and Arlene Holden Scholarship for Chautauqua
W.T. Holland Memorial Piano Scholarship Endowment
Elke Kieserling Hoppe Scholarship
Cyril T.M. Hough Memorial Scholarship Fund
Ruth M. Skinner Hutchins Scholarship Fund
Innes Family Scholarship for Studio Arts
The Dorothy M. Jackson Memorial Scholarship in Piano
The Lucinda Ely Johnson Scholarship
The Max and Eddyte Kahn Scholarship Fund
The Nancy and Norman Karp Scholarship Fund
Thomas E. Kaufman Memorial Music Scholarship
The Kaylor Family Scholarship
The Danny Kayne Music Scholarship Fund
Audrey and Kenny Kobliitz Scholarship
Konneker Scholarship
The John and Mary Lou Kookogey Scholarship
Felicia and Andy Landis Memorial Fund
The LaPenna-Koch Scholarship
The Marilyn G. Levinson and Nathan Gottschalk First Chair Award for MSFO Endowment
Anne R. Logan Scholarship Fund
Craig J Luchsinger Memorial Scholarship
The Anne Mary and Richard M. Maddy Music Scholarship Fund
Marianne Elser Markham Endowment Fund
The Lucille J. McClure Memorial Music Scholarship Fund
Robert J. McKibbin Memorial Scholarship for Visual Arts
Everett and Sarah Holden McLaren Scholarship
David L. and Jane K. Miller Art Scholarship
Laurie Miller Piano Scholarship
Laurie Miller Voice Scholarship
Ralph E. Miller Memorial Scholarship for Music
The Ralph J. Miller and Florence L. Miller Memorial Scholarship in Music
The Sylvia Lucas Miller Scholarship in Music
The William E. Miller, Jr. Theater Scholarship
The Augusta L. Ebert Molyneaux Scholarship
The Elmer G. Molyneaux Scholarship
The Mary Louise Molyneaux Scholarship
Moore Scholarship Fund for Music
Jack I. and Barbara J. Morris Memorial Cello Scholarship
Gertrude T. Munger Piano Award Fund
The Abe Neches Scholarship for Dance
The Marian A. Neubauer Scholarship
Lily Lee Nixon Fund
ENDOWMENT FUNDS (CONT.)

The Fayette S. Olmstead Foundation and Pittsburgh National Bank Charitable Trust Fund
The Bernard Paul Memorial Scholarship Fund
Mary Elizabeth Peffer Music Scholarship
Rosalie H. Pembridge Dance Scholarship
Pennsylvania Scholarship Fund
Pennybacker Memorial Scholarship
Charles John Petre Memorial Fund Trombone Award
William and Jane Pfefferkorn Scholarship for Music
The Ernest W. and Jeannette McClure Polley Scholarship
Av and Janet Posner Art Scholarship
Henry Rauch Memorial Scholarship
The Douglas A. Raynow Memorial Scholarship
Robert D. Redington Memorial Scholarship
Joseph W. and Marilyn Hyder Richey Scholarship Endowment
Rizzolo Family Fund
Roblee Scholarship for Families
Joseph H. and Florence A. Roblee Scholarship
The Catherine Prussing Rodgers Scholarship
The Josette and Ronald Rolley Scholarship
Mary McQueen Ross Scholarship
Glen and Ruth Roush Scholarship Fund
The Richard B. Rubin Scholarship Fund
The Sack Family Scholarship
Ann and Isidor Saslav Violin Scholarship in Honor of Mischa Mischakoff
The Henrietta W. Schlager Scholarship
The Charles G. Schwartz Scholarship
Kuniko Washio Scollard Scholarship Fund for Music
The Sabina Mooney Seifert Memorial Scholarship
Shreveport Friends’ Music Scholarship
A. Pope and Peggy B. Shuford Dance Scholarship
Ronald Perry Smith Scholarship Fund
The Dr. William T. and Virginia W. Smyth Fund
The Suzanne Gaider Sroka Scholarship
The Madge Ryan Stirniman Scholarship
George and Marianne Strother Scholarship Fund
Tustin Memorial Fund
Alfredo Valenti Scholarship Fund
Glenn G. Vance Music Scholarship Fund
Nina T. Wensley Scholarship
Katherine Karslake White School of Music Scholarship
The Dr. Frits & Corrie Wiebenga Scholarship Fund
The Rachel Wilder and Phil Lerman Scholarship
Victoria Willen Scholarship Fund for the Arts
The Mark W. Williams Scholarship
Mary Chenoweth Wright Scholarship Endowment
The Harriet G. Yanes Dance Scholarship
The John B. Yoder Music Scholarship
Chadwick Young Scholarship

FLEXIBLE PROGRAM FUNDS

$4,104,636 Assets
$172,706 Support to the Institution

The Bromeley Family Fund
The Carnahan-Jackson Foundation Fund for Chautauqua
The Chautauqua/Jamestown Fund for Education, Religion and the Performing Arts
Connolly Endowment for Chautauqua
The Winifred S. Dibert Fund for Chautauqua
Elizabeth Elser Doolittle Endowment Fund for Adult Programming
H. David Faust Leadership Fund
Scott and Patti Fine Endowment Fund
The First Family Fund
The George and Julie Follansbee Family Fund
Craig and Cathrine Greene Family Fund
The Jane Robb Shaw Hirsh Endowment
The Jim and Lynn Gasche Levinson Fund for Chautauqua
Locke-Irwin Fund
The Loynd Family Fund
The Mackenzie Fund for Chautauqua
Cornelia Chason Miller Memorial Fund
The Lewis Miller Memorial Fund
The Walter L. and Martha Tinkham Miller Fund
The Miriam S. Reading/Richard H. Miller Fund
The Helen H. and Paul L. Sample Fund
The Donald Chace Shaw Fund
Tate Family Endowment for Fine and Performing Arts
The Edris and David H. Weis Family Fund

OTHER SPECIFIED FUNDS

$912,598 Assets
$36,812 Support to the Institution

Allegheny Jazz Society Fund
Barakat Fund
Philip J. and Barbara S. Brunskill Fund
Buffalo-Chautauqua Idea and Connection: Galucki Family Endowment Fund
The Cook Fund
Cornell/Ingram/Karslake Awards Fund
Elizabeth Dickson Memorial Fund
Valentine and Elizabeth Rider Frees Fund
The Chautauqua Boys’ and Girls’ Club has been at the heart of youth programming at Chautauqua since 1893. Not only has it been entertaining and educating Chautauqua’s children for over 120 years, but it has created a safe place where children can grow into their independence at an early age and learn the beauty and benefit of recreation beyond competitive sports. Club is also where life-long bonds begin and best friends are made. There is no denying that Club provides a special experience for the thousands of youth that visit Chautauqua each summer.

Jack and Yvonne McCredie know this well. From their cottage on the south end of the grounds, perched above the tennis courts and a stone’s throw from Club, they observe the daily buzz of activity as children ride their bikes to and from the waterfront. Jack participated in Club in his youth as did Jack and Yvonne’s children. Now their grandchildren share in the Club experience.

Eyewitness to the impact of Club for more than seventy years, Jack and Yvonne initiated discussions that led to their decision to endow the director position at Boys’ and Girls’ Club, currently held by Greg “Coach” Prechtl. This gift to the Promise Campaign is being funded under the new favorable conditions approved by Congress last year for distributions from their IRA.
The following donors have contributed $10,000 or more to the endowment of the Chautauqua Foundation. We thank them for perpetuating the idea and place of Chautauqua. These totals include gifts received, pledged, transferred to the pooled life income fund and certain planned gift commitments made since May 1937.

New donors are denoted with orange and changes in giving levels are denoted with a green dot.

**In Excess of $2,500,000**
The Carnahan-Jackson Foundation
Susan and Thomas Hagen
Mr. and Mrs. Richard M. Rieser
Steve and Polly Percy
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Will Konneker  
Joan Lincoln  
Peter Locke  
Lynn Metzger  
Fran Miller  
Laurie Ariane Miller  
Archie Moran  
Lewis and Tass Morgan  
Gail Nameche  
Frances Rudolph Newman  
Robert B. Pace  
Paco  
Norman Pedersen  
Jennifer Pinsof  
Douglas Raynow  
Martha Reed  
Thomas Roantree  
Catherine Prussing Rodgers  
Benjamin Mitchell Roose  
Harry Rose  
Gene Sadowski  
Pat Scott  
George Shader  
Robert Shellgren  
William Skerlong  
Robert G. Smith  
Marjorie Sterritte  
John Streeter  
Ken Strickler  
William Terry  
Bob Thomas  
Joel Tolerton  
Dr. Paul Twist  
Marilyn Weizenbaum  
Jane Welch  
Nina T. Wensley  
Mary Whitaker  
Tom Wineman

2016 Honororary Gifts

The Foundation gratefully acknowledges endowment contributions made in honor of the following:

Marguerite Allen  
Judy Austin  
Jim and Johnette Barnes  
Gaylyn Bell  
Harvey and Bayla Biskin  
Caroline Van Kirk Bissell  
Jane Brown  
William and Ellen Brown  
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Karen Bryant  
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Curtis and Teresa Carter  
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Clay and Ann Eaves  
Mr. and Mrs. Bill Fleming  
Janet Fowler  
Sara France  
Mr. and Mrs. Gary Gaskins  
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Joseph and Toni Goldfarb  
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Francis Ellen Hewitt  
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Howard and Barbara Schiller  
William Scollard and Kuniko Washio  
Walter C. Shaw III  
Ann Slonaker  
Tucker Smathers  
Jimmy and Karen Stevens  
Jason and Nancy Weintraub
There is a new landmark on the grounds of Chautauqua — Timothy’s Playground — where at any given moment there is likely to be a gaggle of children laughing and parents enjoying this space where families can come together and play. This place also holds the spirit of a Chautauquan taken far too soon. Timothy Ritacco, the first-born son of Mark Ritacco and Ann Ayers, died in 2004 of Sandhoff’s disease at just sixteen months of age.

Enter a group of Mark’s and Ann’s friends from the Chautauqua Boys’ and Girls’ Club, where Mark was a grouper and Ann and Mark were both counselors. Every summer, for the past 11 years, they have gathered one Saturday morning at Club to play basketball and kickball, sell lemonade and snacks, and raise money to build a playground in Timothy’s memory.

The playground was officially dedicated this past summer. As Ann and Mark reflected on it they remarked, “Timothy’s playground stands as a symbol of the kind of friendships that can love you through the hardest of times, and create the best of times for you to smile back on. This isn’t just Timothy’s legacy; it is Chautauqua’s legacy. Our children and our friends’ children have played kickball and basketball, and bought lemonade and snacks over the years. They have made donations. Timothy’s Playground is their playground. It’s an incredible experience for us and them to see their hard work — and hard play — become reality.”

The space is filled with natural wood structures including a racecar, climbing tunnel, benches and a table and chairs, all carved lovingly by a member of the Institution staff. The wood for those structures comes from trees cut down near the Amphitheater and in Miller Park. Stepping stumps and a balance beam set were also created from Institution trees that have now found a new life.

Recognizing the importance of sustaining this special new addition to Chautauqua’s landscape, Timothy’s Playground Endowment has been established for the future care and maintenance of the playground.

Timothy’s playground is dedicated to his memory and stands today as a symbol of what it means for a community to come together and give new life and lasting laughter to those we love.
The Eleanor B. Daugherty Society was established to honor those individuals who have remembered Chautauqua in their estate plans through a bequest intention, a life income arrangement, a gift of real estate, as beneficiary of an IRA, or trust. The society was named in honor of the late Eleanor B. Daugherty, a Chautauquan and retired music teacher from Buffalo, New York, who left a major bequest to Chautauqua. New members are highlighted in orange.

Anonymous (16)
W. Andrew Achenbaum
Joan B. Alexander
Dr. Robert K. Alico
Caroline Thompson and Steve Allen
Joanne and Henry Altland
John E. Anderson
John and Diane Arch
Sherra and Jim Babcock
James M. Bailey
Mr. and Mrs. John T. Bailey
Drs. Arthur and Barbara Banner
Robert and Mary Bargar
Constance Barton
William E. and LaDonna G. Bates
Bob and Joan Battaglin
Robert W. and Janet W. Baum
Nancy Bechtolt
Ann C. Beebe
Mary and Charles Begerow
Jill and Arnie Bellowe
Christina Bemus
Alice Benedict
Stephen and Edith Benson
Bobbi and Donald Bernstein
Caroline Van Kirk Bissell
Mary Blair
Robert and Jean Boell
Cathy Bonner
June Bonyor
Diana and David Bower
Loretta Bower
Ted Arnn and Mary Boyle
P. James and Barbara Brady
Kathy and James Graham
Barbara and Twig Branch
Sharon and David Britton
Margaret and William Brockman
Steven and Cynthia Brown
Audre Bunis
Frederic J. and Susan Franks Buse
Mr. and Mrs. Richard J. Buxbaum
Gloria A. Caldwell
Andrew L. and Gayle Shaw Camden
Mr. and Mrs. David H. Carnahan
Christine and Ken Caro
Susan Cartney
Jean Chenev
Carol and Jim Chimento
Molly Rinehart and Charles Christian
Geoff and Kathy Church
Marilyn and Sebastian Ciancio Hon. and Mrs. Bill Clinger
Joan R. Clouse
John and Bette Cochran
Helen B. Cochrane
Wendell and Ruth Gerrard Cole
Dorothy Comfort
Jack Connolly
Ira B. Cooperman
Dr. and Mrs. R. William Cornell
John Corry
Dr. Ellis and Bettsy Cowling
Virginia H. Cox
Martin A. Coyle
John and Linda Creech
Christopher and Susan Cribbs
Joseph and Nancy Cruickshank
Carol and John Cummings
Lindy McKnight and Erin Cunningham
Courtney Curatolo
Laura and Brad Currie
James and Karen Dakin
Dan and Carrie Daumer
Dave and Mary Davenport
Richard and Mary Davis
David Delancey
Jennifer DeLancey
John P. DeVillars
June and Barry Dietrich
John and Virginia DiPucci
Judith and Roger Doebke
Rev. Linda L. Dominik
Lee and Barbara Dudley
Carol McCarthy Duhme
Cynthia Norton and Eagle Eagle
David and Miriam Y. Eddleman
Rivona Ehrenreich
Stuart and Jan Eisler
Aggie Fausnaugh
Sylvia M. Faust
Norma Ferguson
Rita Van Wie Finger
Jennifer and Rich Flanagan
Lucille and Michael Flint
Shirley A. Flynn
George L. Follansbee, Jr.
Caryn and Henry Foltz
Charlotte and Chuck Fowler
Barbara Fox
Zetta Fradin
Joanne Fuller
Lois T. Galloway
Louise Farnsley Gardner
Edward and Patsy Garland
vic and Joan Gelb
Marc Geller
Barbara and Peter Georgescu
William and Nancy Gerdes
Christopher and Helena Gibbs
Lauren Rich Fine and Gary Giller
Sherry Stanley and John Giusti
Carole E. Gladstone
Joseph and Toni L. Goldfarb
Karen and Tim Goodell
Dr. Cheryl O. Gorelick
Ellen and Bob Gottfried
Carolyn Graffam
Suzanne Gray
Bluie and Kitty Greenberg
Rodney Schlaflman Greenberg
Elizabeth Ebel Greene
Don and Kathy Greenhouse
Fred and Judy Gregory
Susan Grelick
Kent I. and Fredrika S. Groff
Elisabeth and Jim Groninger
Carl Grunfeld
Travis and Betty Halford
Pegi Hamner
James Pryor Hancock
Kathleen E. Hancock
Judith L. Hanson
Walter and Joan Harf
Terrie Vaile Hauck
Paula and Ray Hecker
William and Anne Mischakoff Heiles
George Herchenroether
Dorothy and Bill Hill
Patricia and Robert Hirt
Sally L. Holder
Anita and Sidney Holec
Bob Hopper
Kathleen Howard
Cheryl S. and Carl W. Huber, Jr.
Pat and Jay Hudson
Gale H. Hurst
Don and Mary Hustead
Robert and Joy Ingersoll
Directors

- David W. Anderson of Hingham, Massachusetts • 2, 5 2019
- John E. Anderson of Lakewood, New York • 5, 7 2016
- Thomas M. Becker of Lakewood, New York • 3
- Cathy Bonner of Austin, Texas - ex officio • 1, 2, 3, 4, 5, 6, 7 2017
  - Chair, Executive Committee
  - Chair, Board of Directors
- P. James Brady of Johns Creek, Georgia • 1, 2, 5 2018
  - Chair, Development Council
- Gary M. Brost of Vero Beach, Florida • 1, 3, 5 2016
  - Chair, Audit Committee
- Andrew L. Camden of Grosse Pointe, Michigan • 5, 6 2017
- John S. Connolly, Jr. of Boynton Beach, Florida • 3, 4, 7 2018
  - Chair, Personnel Committee
- Laura P. Currie of Nashville, Tennessee • 2, 4, 6 2018
- Lauren Rich Fine of Shaker Heights, Ohio • 3, 5, 7 2016
  - Chair, Investment Committee
- Karen J. Goodell of New York, New York • 2, 3, 6 2017
  - Chair, Nominating & Governance Committee
- William R. Goodell of San Francisco, California • 4, 5 2018
- Thomas B. Hagen of Erie, Pennsylvania • 1, 6 2017
- William M. James of New York, New York • 2, 3, 6 2016
- John S. Kobacker of Gahanna, Ohio • 1, 4 2019
- Susan Moran Murphy of Bloomfield Hills, Michigan • 5, 6 2018
- Anne Odland of Washington, D.C. • 1, 5 2018
- George T. Snyder of Pittsburgh, Pennsylvania • 2, 4, 7 2017
- Stephen J. Zenczak of Gates Mills, Ohio • 3, 4, 7 2019
  - Chair, Finance Committee

Term Expires

- 2019
- 2016
- ii
- 2017
- 2018
- 2016
- 2017
- 2018
- 2018
- 2016
- 2019
- 2018
- 2018
- 2017
- 2019

Officers

- Cathy Bonner • Chair
- William M. James • Vice Chair
- John S. Connolly, Jr. • Vice Chair
- George L. Follansbee, Jr. • Chief Executive Officer
- Deborah E. Moore, CPA • Treasurer & Chief Financial Officer
- Linda Jordan Loomis • Corporate Secretary

Staff

- Nikki M. Adams • Administrative Project Manager
- Joshua C. Auflick • Research Associate
- Chris J. Baglia • Gift Administrator
- Karen Blozie • Senior Major Gifts Officer
- Jacqueline A. Chagnon • Director of Stewardship & Donor Relations
- Jill Cummiskey • Assistant Director of the Chautauqua Fund
- Tina E. Downey • Director of the Chautauqua Fund
- George L. Follansbee, Jr. • Chief Executive Officer
- Linda Jordan Loomis • Corporate Secretary
- Deborah E. Moore, CPA • Chief Financial Officer
- Dustin Nelson • Director of Gift Planning
- Megan E. Sorenson • Associate Director of the Chautauqua Fund & Communications Manager
- Nicole K. Szydlo • Senior Researcher & Coordinator of Information Strategy

1 Coincides with term on the Chautauqua Institution’s Board of Trustees
2 Coincides with term as President of Chautauqua Institution

1 - Audit Committee
2 - Development Council
3 - Executive Committee
4 - Finance Committee
5 - Investment Committee
6 - Nominating & Governance Committee
7 - Personnel Committee
**Former Directors**

**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 Roberts • 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 Ams • 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 • December 1983 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
- James G. Groninger • August 1994 to August 2014
- William G. Karslake • August 1994 to August 1995
- Thomas R. Bromeley • August 1995 to June 2001
- Vic Gelb • August 1995 to August 2011
- Selina P. Johnson • August 1996 to August 2008
- Wilfred R. Konneker • January 1996 to August 2006
- Lowell K. Strohl • August 1996 to February 2010
- Miriam S. Reading • January 1997 to August 2006
- 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
- Fred C. Gregory • August 2004 to August 2008
- 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
- Steven W. Percy • August 2007 to August 2015
- John A. Corry • January 2008 to August 2013
- Charlotte A. Fowler • August 2008 to December 2012

**Former Board Leadership**

- Walter Roberts • August 1937 to August 1957
- Harold F. Reed • August 1957 to August 1967
- John D. Hamilton • August 1967 to August 1971
- Richard H. Miller • August 1971 to August 1996
- William F. Hill, II • August 1996 to August 2002
- Lowell K. Strohl • August 2002 to August 2008
- Steven W. Percy • August 2008 to August 2015
- Wendy Cohen • August 2001 to May 2011
- Scott McVay • January 2001 to December 2003
- Allen Short • August 2001 to August 2005
- Fred C. Gregory • August 2004 to August 2008
- 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
- Steven W. Percy • August 2007 to August 2015
- John A. Corry • January 2008 to August 2013
- Charlotte A. Fowler • August 2008 to December 2012
2017 Annual Membership Meeting
Saturday, August 19 • 9 a.m.
One Ames Avenue
P.O. Box 28
716.357.6220 • 716.357.4023 (fax)
foundation@ciweb.org
www.chautauquafoundation.org