

CAROLINA

BUILDING


DEVELOPMENT ANNUAL REPORT

Fiscal Year 2009



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Note: This is an abbreviated version of the printed counterpart but includes all financial data.

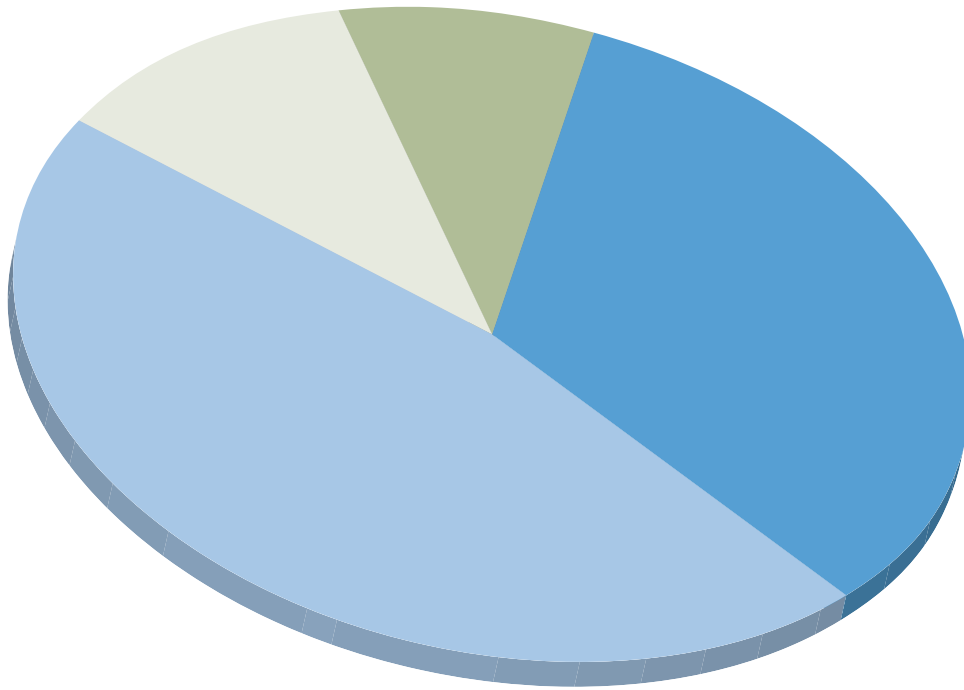


Carolina Development Annual Report: Fiscal Year 2009
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All photography by Dan Sears
Design: UNC Design Services

Gifts by area for FY 2009*



*Rounded to nearest \$100,000

- ACADEMIC AFFAIRS: \$90.2 MILLION
- HEALTH AFFAIRS: \$126.1 MILLION
- ATHLETICS: \$31.7 MILLION
- OTHER: \$23.2 MILLION

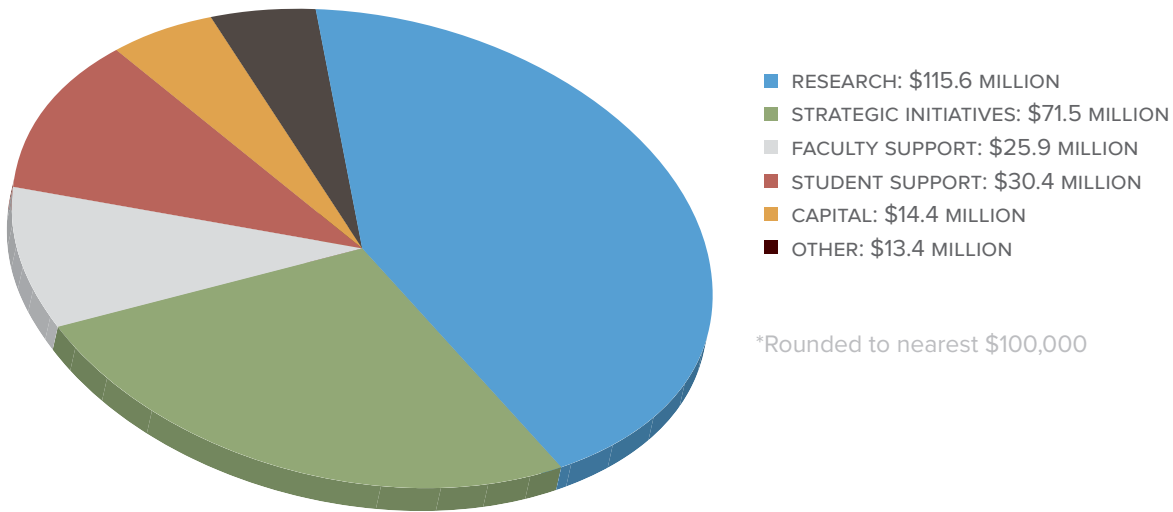
HIGHLIGHTS FISCAL YEAR 2009
 DEVELOPMENT HIGHLIGHTS
 JULY 1, 2008–JUNE 30, 2009

Carolina’s fund-raising efforts brought in **\$271.25 million** in private gifts, marking the second-highest year in history for this type of support, which is immediately available to the University. Only fiscal year 2008’s gift total of \$301 million tops the 2009 mark, and UNC was

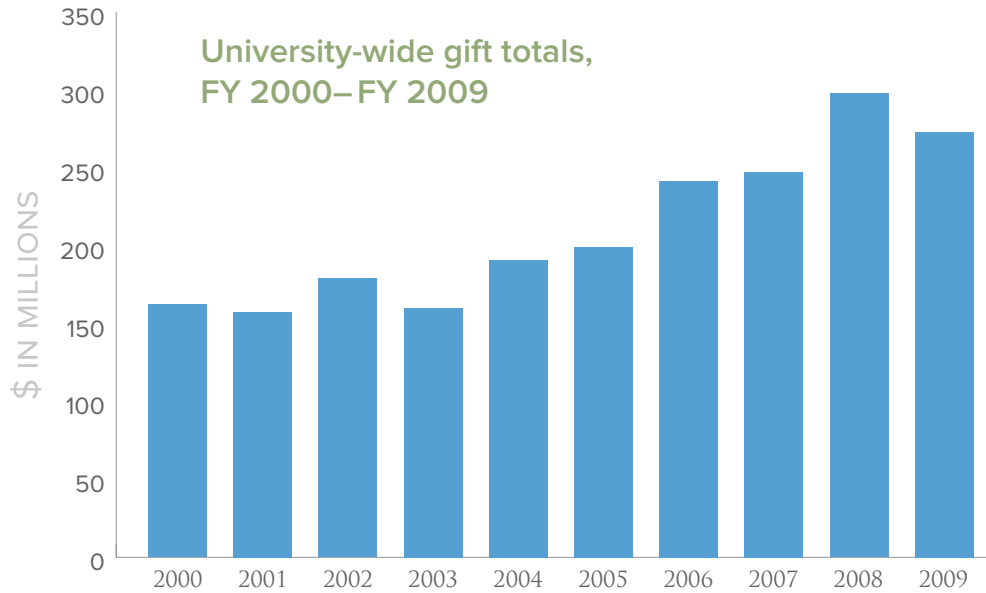
in the final months of a major fund-raising campaign—the Carolina First Campaign—that year.

In commitments (pledges and gifts) for fiscal year 2009, UNC raised \$290.4 million.

FY 2009 gifts by purpose*



*Rounded to nearest \$100,000



Highlights from the year:

Alumna Sallie Shuping-Russell of Chapel Hill made the first major gift of Chancellor Holden Thorp's administration in July. She committed **\$666,000 to create the Sallie Shuping-Russell Distinguished Visiting Professorship in UNC's Creative Writing Program**, part of the Department of English and Comparative Literature in the College of Arts and Sciences. (See story, page 44.)

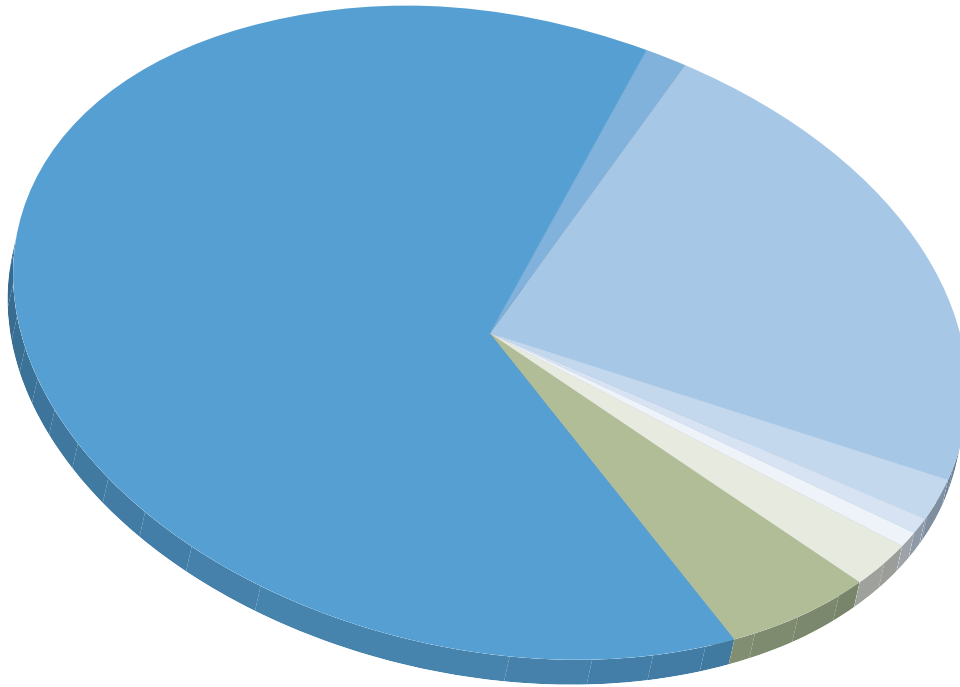
Private gifts have joined state matching funds to create a \$21.5 million endowment to complete a goal to **double the number of students invited to UNC's Honors Program in**

the College of Arts and Sciences. A **\$2 million capstone commitment** from the Hyde Family Foundations of Memphis, Tenn., provided the funds to reach the goal. With the endowment and more available honors courses, 10 percent of entering students will receive invitations to the program.

A **\$4.5 million grant** from the Andrew W. Mellon Foundation is supporting graduate students in the departments of **English and comparative literature, history, philosophy, and religious studies in the College of Arts and Sciences.**

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Donors in FY 2009*



*Percentages rounded to nearest 10th

- ALUMNI: 49,696 (64.1% OF TOTAL)
- FACULTY/STAFF: 1,009 (1.3%)
- FRIENDS: 17,746 (22.9%)
- CORPORATIONS: 1,689 (2.2%)
- FOUNDATIONS AND TRUSTS: 591 (.8%)
- OTHER ORGANIZATIONS: 657 (.8%)
- STUDENTS: 1,859 (2.4%)
- PARENTS: 4,239 (5.5%)

HIGHLIGHTS, CONTINUED

The grant will join \$2.76 million in funding from the University to endow the Mellon Graduate Fellowship Program. (See story, page 38.) The Mellon foundation also supported the **Ackland Art Museum with \$1.25 million** to deepen and expand the museum's role in the education of University students.

The Bill & Melinda Gates Foundation committed **\$22.9 million for a new project that aims to improve the reproductive health of the urban poor in Sub-Saharan Africa and South Asia.**

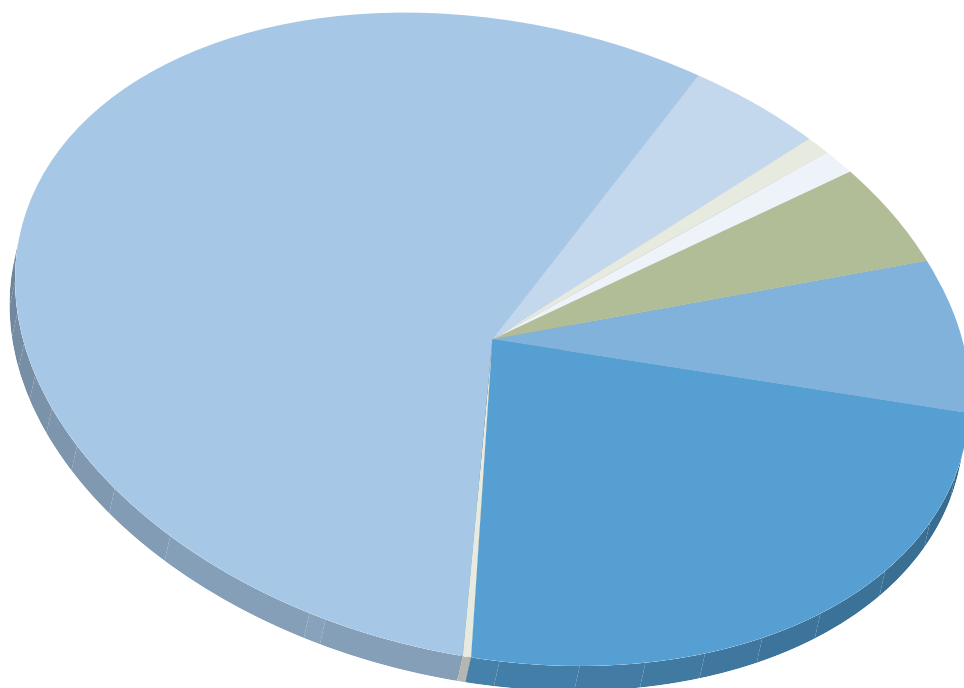
William B. Harrison Jr., a 1966 UNC graduate and retired chairman and director of JPMorgan Chase & Co., committed

\$1 million to help launch a new Global Research Institute

at UNC as well as support efforts to enhance Carolina's international presence. The institute emerged as the top initiative identified by the Global Leadership Circle, a task force led by Harrison charged with developing a strategic roadmap for internationalizing the University.

As a result of a \$4 million private gift from the William R. Kenan Jr. Charitable Trust, along with funds from the Higher Education Bond referendum and other University resources, UNC **dedicated the new, 100,000 square-foot Kenan Music Building** on April 1. Offering proper acoustics, significant rehearsal and performance halls as well as classroom space and

New donors in FY 2009*



*Percentages rounded to nearest 10th

- ALUMNI: 3,663 (25.1% OF TOTAL)
- FACULTY/STAFF: 38 (.3%)
- FRIENDS: 8,162 (56%)
- CORPORATIONS: 691 (4.7%)
- FOUNDATIONS AND TRUSTS: 95 (.7%)
- OTHER ORGANIZATIONS: 143 (1%)
- STUDENTS: 684 (4.7%)
- PARENTS: 1,109 (7.6%)

a recording studio, the building became the new home of the Department of Music, previously housed in Hill Hall since 1930.

The Jessie Ball duPont Fund created a **matching-grant program that will provide up to \$210,000 to support new and existing partner high schools in the Carolina College Advising Corps.**

Held April 14, the **2009 Undergraduate Scholarship Dinner** brought together UNC scholarship recipients and the donors who made their financial support possible. The event featured speakers Bob Eaves, husband of N.C. Gov. Beverly Perdue (who attended), and Joshua Rudisill, a Class of 2009 student

who received a need-based scholarship that the Eaves family established to honor Bob's father.

UNC will be part of a new **Global Education Research program created by Lenovo** to analyze and measure the impact of technology on students' educational experiences from first grade through higher education. A \$300,000 gift from Lenovo is funding the initiative, based in UNC's Center for Faculty Excellence.

Alumna Jane Iris Crutchfield bequeathed more than **\$1 million to the UNC School of Information and Library Science** in

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Endowed professorships

21 professorships created in FY 2009

446 professorships total (as of June 30, 2009)

Distribution of professorships created by FY 2009 gifts

- 12 College of Arts and Sciences
- 1 School of Government
- 1 School of Journalism and Mass Communication
- 6 School of Medicine
- 1 University

In fiscal year 2009, the State of North Carolina Distinguished Professors Endowment Trust Fund provided a total of \$4.3 million in matching funds to boost the value of Carolina donors' contributions. The state fund, established in 1985 by the N.C. General Assembly, helps UNC system schools recruit and retain outstanding faculty.

Scholarships/fellowships

53 scholarship funds created in FY 2009

1,298 scholarship funds total (as of June 30, 2009)

33 fellowship funds created in FY 2009

658 fellowship funds total (as of June 30, 2009)

HIGHLIGHTS, CONTINUED

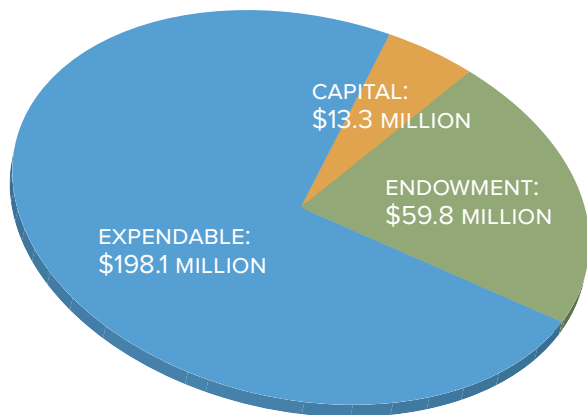
memory of her mother, Janie Gammon Crutchfield. The gift will support student scholarships.

On April 25, Chancellor Holden Thorp honored six outstanding UNC employees with the **2009 C. Knox Massey Distinguished Service Award**, one of the most coveted honors bestowed by Carolina. The recipients were: Pamela Breeden, housekeeper; Darryl Gless, professor in the Department of English and Comparative Literature, College of Arts and Sciences; Victoria Madden, a research specialist in the Department of Pathology and Laboratory Medicine; Jane Smith, associate director of University Events in University

Advancement; Timothy Taft, a professor of orthopaedics in the School of Medicine and director of Sports Medicine; and Anna Wu, director of Facilities Planning and University architect. The late C. Knox Massey of Durham, N.C., created the awards in 1980 to recognize "unusual, meritorious or superior contributions" by University employees. In 1984, he joined the families of his son, Knox Massey Jr., and daughter, Kay Massey Weatherspoon, in creating the Massey-Weatherspoon fund.

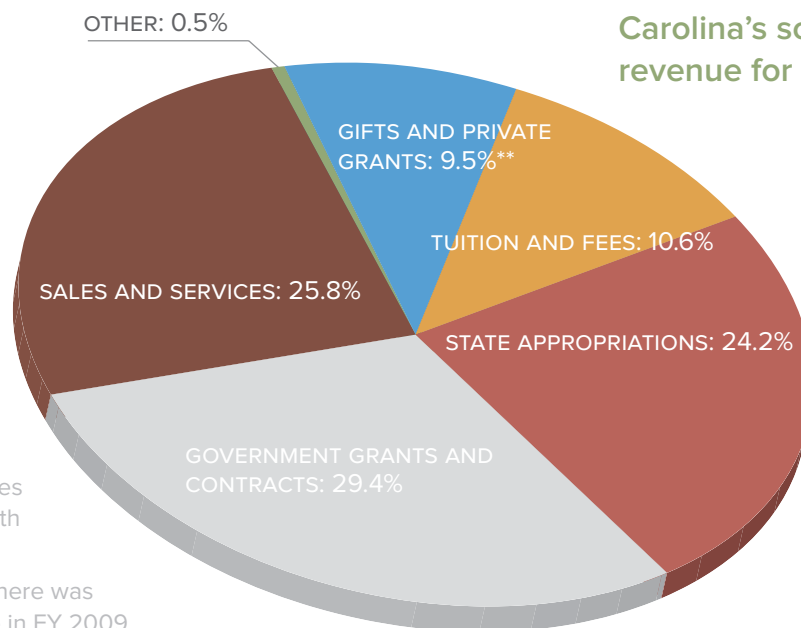
Chapel Hill was one of only three U.S. cities to host **Russia's renowned Bolshoi Ballet**. The June performance also was the only one at which both *Don Quixote* and *Swan Lake* were staged. Private funding from a pre-performance gala helped

Total FY 2009 gifts: endowment, expendable and capital*



*Rounded to nearest \$100,000

Carolina's sources of revenue for FY 2009*



*Unaudited; percentages rounded to nearest 10th

**Typically includes investment income—there was no investment income in FY 2009

offset the \$1 million price tag of bringing the company to Chapel Hill. The magnificently renovated Memorial Hall, completed in 2005 with nearly \$6 million in private funding as part of the \$18 million renovation, was a significant factor in attracting the Bolshoi to Carolina, the only southeastern venue on its itinerary.

Robert C. Allen, James Logan Godfrey Professor of American Studies, History and Communication Studies, was the inaugural recipient of funding from the **C. Felix Harvey Award to Advance Institutional Priorities at UNC**. The award is supporting Allen's web-based digital history project aimed at capitalizing on the University Libraries' renowned North Carolina Collection and award-winning digital publishing

initiative, *Documenting the American South*, to enable local organizations and individuals to learn about the character and identity of North Carolina towns over the past century. The annual Harvey Award, endowed by a \$2 million commitment from the Harvey family of Kinston, N.C., provides \$75,000 to fund the project, designed to reflect the 2008–2009 academic year competition's focus on engagement and outreach.

The first **Eve Marie Carson Memorial Junior-Year Merit Scholarship**, awarded to UNC junior Elinor Benami, funded a summer experience after her junior year and financial aid for her senior year. The scholarship honors Carolina's former student body president, who was killed in March 2008.