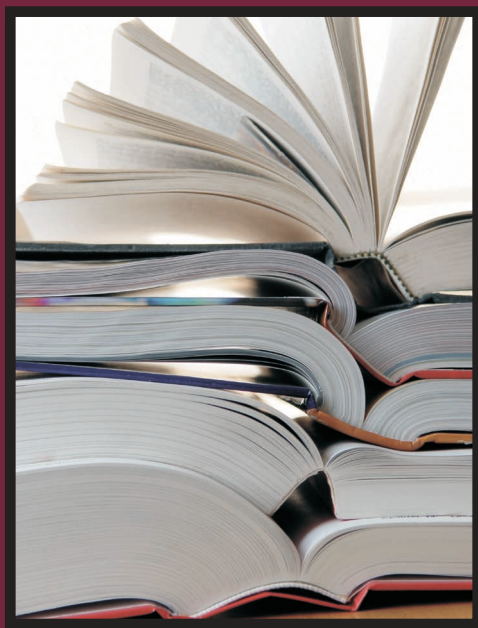


Annual Report of the North Caroliniana Society



2023-2024

“SUBSTANCE, NOT SHOW”

NORTH CAROLINIANA SOCIETY

2023-2024 ANNUAL REPORT
NORTH CAROLINIANA SOCIETY

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Forty-Ninth
Annual Report of the
North Caroliniana
Society
2023-2024

“SUBSTANCE, NOT SHOW”

NORTH CAROLINIANA SOCIETY

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North Caroliniana Society

“Before the end of each calendar year, the Secretary shall prepare, print and mail to each member of the Society a publication titled *Annual Report of the North Caroliniana Society* covering the activities of the immediately preceding fiscal year, including an accounting of each separate Fund reflecting its income, expenditures, balances and services performed in conformance with the purposes for which the fund was established.”

— *Board of Directors, December 5, 2003*

Chartered on 11 September 1975 as a private nonprofit corporation under provisions of Chapter 55A of the General Statutes of North Carolina, the North Caroliniana Society is dedicated to the promotion of increased knowledge and appreciation of North Carolina’s heritage through the encouragement of scholarly research and writing in and teaching of state and local history and literature; publication of documentary materials, including the numbered, limited-edition *North Caroliniana Society Imprints* and *North Caroliniana Society Keepsakes*; sponsorship of professional and lay conferences, seminars, lectures, and exhibitions; commemoration of historic events, including sponsorship of markers and plaques; and through assistance to the North Carolina Collection of UNC-Chapel Hill and other cultural organizations with kindred objectives. The Society’s motto is “Substance, Not Show.”

Founded by H.G. Jones and incorporated by Jones, William S. Powell, and Louis M. Connor Jr., who soon were joined by a distinguished group of North Carolinians, the Society was limited to a hundred members for the first decade. It elects from time-to-time additional individuals meeting its strict criterion of “adjudged performance” in service to their state’s culture — i.e., those who have demonstrated a continuing interest in and support of the historical, literary, and cultural heritage of North Carolina.

The Society, a tax-exempt organization under provisions of Section 501(c)(3) of the Internal Revenue Code, expects continued service from its members, and for its programs it depends upon the contributions, bequests, and devises of its members and friends.

President's Letter



*Outgoing Society President James W. Clark, Jr and Incoming Society
President Bland Simpson*

Dear North Caroliniana Society Members,

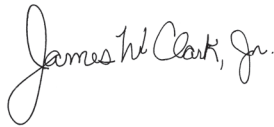
This message is my final one as president of the Society. During the decade of program growth and fiscal development I have spent in this office, I have witnessed an expansion of vision as well as mission in our collaborative work, among ourselves and with other organizations. We also created and followed our first strategic plan and hired and retained an invaluable executive director. Copie Cain has helped make our outreach activities and our stewardship successful and accountable. Our website is now more reflective of our achievements as well.

With your cooperation we have been successful, too, in making committee assignments that assist the Society's executive committee in working with collaborators and our board. Each funded endeavor, the Archie K. Davis Fellowships, the book prize, and the William S. Powell Award, for example, has its own active committee. A budget committee and a grants review committee are in place. Grant cycles have been established and are followed. Guided by the executive committee, William C. Friday Teacher Retreats have become annual events in partnership with Carolina K-12 of Carolina Public Humanities. The North Carolina Division of Archives and History and the North Carolina Collection at Carolina, our oldest beneficiaries, remain in our funding cycle for significant support. The work of the nominating committee, in particular, has allowed the Society to grow its membership while identifying members who will serve in elected positions. All of our record of professional development, recognition, and

service are reflected in the 2023-2024 Annual Report. Work is underway on a new strategic plan for the Society.

Next year will be the fiftieth anniversary of our founding by H. G. Jones. The substance of our natural and cultural heritage and the skills and generosity of our past and present members encourage me to see a bright future for the Society. Increasingly we are experiencing an expanding sense of how important it is for young people to choose courses of study and career paths that qualify them to assume leadership roles in our ongoing, challenging work of teaching, preserving, interpreting, and celebrating the ecology of our total environment. I emphasize this point whenever I speak to teachers, students, and parents at National History Day or the Friday Retreats. The Society's highest awards will be presented this year to Dr. Kevin Cherry and Dr. Jo Ann Chavis Lowery. We call attention to them as important leaders for whom nature and culture are bonded.

Thank you for the opportunity to serve.



James W. Clark Jr., *President*

NORTH CAROLINIANA SOCIETY MEMBER NECROLOGY

- Walter R. Turner, *member since 2010* (September 19, 1942 – October 2, 2023)
- Edwin M. Yoder Jr., *member since 1991* (July 18, 1934 – November 30, 2023)
- Lila Ponder Friday, *member since 2014* (October 28, 1930 – January 2, 2024)
 - Fred Chappell, *member since 2000* (May 28, 1936 – January 4, 2024)
 - John C. Martin, *member since 2023* (November 9, 1943 – April 9, 2024)
 - G. Paul Carr, *member since 2003* (January 28, 1936 – August 9, 2024)
 - J. Haywood Davis, *member since 2018* (July 2, 1947 – August 21, 2024)
- David O. Stephens, *legacy member since 2010* (April 23, 1947 – August 30, 2024)

Annual Membership Meeting and Awards Ceremony

APRIL 24, 2024
THE CAROLINA INN

Society members gathered with friends and family in Chapel Hill on April 24, 2024, to celebrate and honor the Society's award recipients. The afternoon program by Kevin Cherry was followed by award presentations, a social hour, dinner, and tributes.

Number 65 of the North Caroliniana Society Imprints, titled *A Future for Our Histories* by Kevin Cherry, includes an address by and a tribute to the winner of the Society's 2024 Society Award.

Imprint Number 65 also includes praise for *A Man of Bad Reputation: The Murder of John Stephens and the Contested Landscape of North Carolina Reconstruction* by Drew A. Swanson, winner of the Society's 2023 Book Award, and 2024 Carolina graduate Rober Elliot Clay who received the William Stevens Powell Award.

Videos of the celebration in Chapel Hill on April 24, 2024 can be found on the Society's website: www.ncsociety.org.



Robert Elliot Clay, 2024 Powell Award;
Kevin Cherry, 2024 Society Award; Drew Swanson, 2023 Book Award

2024 NORTH CAROLINIANA SOCIETY AWARD: Kevin Cherry

This year the Society Board of Directors voted to award the fifty-fifth North Caroliniana Society Award to Kevin Cherry, our enduringly wise preservationist and good-humored cultural servant.

A highlight of the Society's year is the presentation of the North Caroliniana Society Award for long and distinguished service in the encouragement, production, enhancement, promotion, and preservation of North Carolina's heritage.

"On top of coming from a storytelling culture, I have been blessed to do a special kind of storytelling for both a vocation and a hobby. Don't ask me where the one ends and the other begins. I have no idea and have never known. I do know that History is a storytelling business."

— THE FUTURE OF OUR HISTORIES BY KEVIN CHERRY



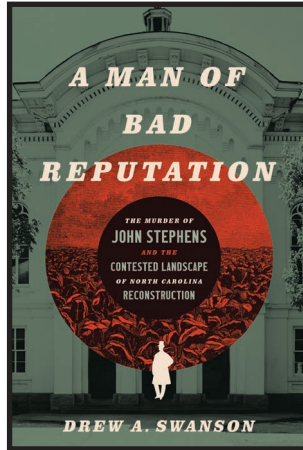
Kevin Cherry

2023 NORTH CAROLINIANA
SOCIETY BOOK AWARD:
**A Man of Bad Reputation:
The Murder of John Stephens
and the Contested Landscape
of North Carolina Reconstruction**

BY DREW A. SWANSON

This year the North Caroliniana Book Award was awarded to Drew A. Swanson, author of *A Man of Bad Reputation: The Murder of John Stephens and the Contested Landscape of North Carolina Reconstruction*. Mike Hill, Book Award Committee Chair, shared “his is a top notch story of this shameful chapter in our state’s history.”

The North Caroliniana Society established the North Caroliniana Book Award in 2003 to recognize annually “the book that captures the essence of North Carolina by contributing powerfully to an understanding of the state.” Authors are eligible regardless of residency. However, neither authors nor publishers submit books; instead, a committee privately surveys all books published during the year and chooses the volume that it believes “makes a positive contribution and appears to have the best chance of standing the test of time as a classic volume of North Caroliniana.”



LEFT: Drew A. Swanson RIGHT: *A Man of Bad Reputation: The Murder of John Stephens and the Contested Landscape of North Carolina Reconstruction*

2024 WILLIAM STEVENS POWELL AWARD: Robert Elliot Clay

This year the William Stevens Powell Award was awarded to Robert Elliot Clay, a senior from Durham, North Carolina studying philosophy. Following graduation, he will be attending law school. Philosophy major Robert Clay is committed to expanding healthcare access as a 2023-2024 Zietlow Civic Engagement Fellow at Carolina Public Humanities. Working with Professor Jonathan Oberlander, Rob aims to demystify signing up for Medicaid by low-income and historically marginalized Orange County citizens. As a Public Service Program Coordinator with medical experience, he began developing his community engagement philosophy at the Carolina Center for Public Service in 2022.

The William Stevens Powell Award was established in 2002 by the North Caroliniana Society in honor of the Society's first president, long-time vice-president, and distinguished historian. The award recognizes a student who, during the student's career at the University of North Carolina at Chapel Hill, has done the most to develop an interest in, and understanding of, the history and traditions of the nation's oldest state university. Absent a deserving recipient as so adjudged, the award may be presented to the University of North Carolina at Chapel Hill student who has done the most to develop interest in, and understanding of, the history of the state of North Carolina.



LEFT: James W. Clark Jr. and Robert Elliot Clay, April 24, 2024

RIGHT: James W. Clark Jr. and Robert Elliot Clay, UNC Chancellor's Awards Program, April 23, 2024

Programs, Grants and Projects

During the year the Society has continued to honor, support and collaborate with qualified individuals and organizations, identified in the Society's Strategic Plan as collaborators.

CONTINUED SUPPORT:

- Archie K. Davis Fellowships
April 2024: Five Fellowships awarded
- National History Day and H.G. Jones N.C. History Award
National History Day Theme
H.G. Jones NC History Day Awards
National Contest Results
Continuing Education
- The North Carolina Historical Review
- North Carolina Collection, Wilson Library, UNC-CH
Converting On-Site Exhibits to Traveling Exhibits
Conservation of Sir Walter Raleigh Portrait
Online Exhibits Project
- Portraits of Climate Change in NC: Snapshots and Stories of a Transforming State
- William Friday Teacher Education Initiative
The Annual William Friday Teacher Retreat
Testimonials from Initiative Participants

FOLLOW UP:

The North Carolina African American Heritage Commission and N.C. Office of Archives and History collaborative book project has an anticipated publication in late summer 2025.

ARCHIE K. DAVIS FELLOWSHIPS

(funding: Archie K. Davis Fund)

The Archie K. Davis Fellowships were established in 1987 through a fund created by the Research Triangle Foundation in honor of the retiring Foundation Board Chair and longtime North Caroliniana Society member and Society President Archie K. Davis.

Each year fellowships are awarded to scholars for research on North Carolina topics. Since 1988 more than 400 scholars have received Davis Fellowships which have resulted in numerous articles, monographs, and books exploring the state's history.

2023-2024 FELLOWS:

The recipients chosen by the Society in April will receive a \$4,000 stipend. Congratulations to these awardees for 2024:

- Emily Magness
*"If you had paid attention, you would know":
The Sacred World of Eighteenth-Century Cherokee- Anglo Politics*
- Hunter Moskowitz
*Race and Labor in the Global Textile Industry:
Lowell, Concord, and Monterrey in the Early 19th Century*
- Jordan Smith, Ph.D.
The Martin Family and a Violent Atlantic World
- Joshua Strayhorn, Ph.D.
*Somewhere to Lay My Head: Black Mobility, Migration,
and Landownership in Eastern North Carolina, 1861-1900*
- Francena Turner, Ph.D.
*Carrying the Weight of the World: Black Women, Civil Rights,
& Black Power at Fayetteville State University, 1960-1972*



TOP: Emily Magness, Hunter Moskowitz

BOTTOM: Jordan Smith, Ph.D., Joshua Strayhorn, Ph.D., Francena Turner, Ph.D.

NATIONAL HISTORY DAY AND H.G. JONES N.C. HISTORY AWARDS

(funding: H.G. Jones Fund)

N.C. History Day is administered by the N.C. Department of Natural and Cultural Resources and is an affiliate of the National History Day program (www.NHD.ORG).

Since 1974, the National History Day program has recognized and rewarded students for completing in-depth research and creating original projects that further appreciation and understanding of history.

National History Day is a yearlong academic program that engages students in grades 6 through 12 with the discovery of history. Students choose historical topics related to an annual theme, conduct extensive primary and secondary research, analyze and interpret their sources, draw conclusions about their topics' significance in history, and present their work in one of five categories — historical papers, websites, exhibits, performances, or documentaries.

Students first compete in one of the seven regional contests across the state. Regional finalists are then invited to attend the state contest. The top two finalists in each category and division are then selected to represent N.C. at the national contest. With guidance from staff and judges, students can improve their projects at each stage of the competition and continue to research and learn.

Visit <http://bit.ly/3UgQmuO> to view the students' projects

The Society began support of National History Day in North Carolina in 1998 when it became the first organization to sponsor special prizes. That support has grown into annual sponsorship of the program, and a contribution of \$15,000 was awarded to The Federation of N.C. Historical Societies as part of continued commitment to provide support to North Carolina students and teachers.

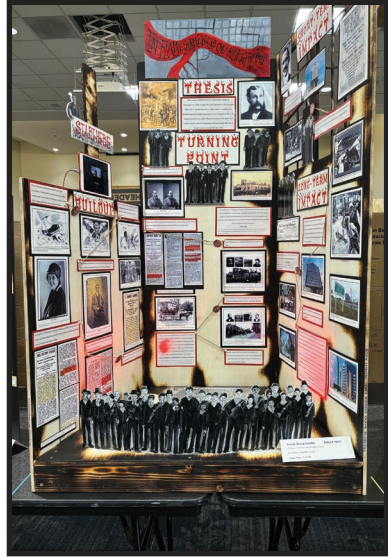
NATIONAL HISTORY DAY THEME:

"FRONTIERS IN HISTORY: PEOPLE, PLACES, IDEAS"

- | | | |
|----------------|--------------------|--------------------|
| • STATEWIDE | • STATE CONTEST | • NATIONAL CONTEST |
| 6,323 Students | 419 Students | 51 Students |
| 116 Schools | 57 Schools | 23 Schools |
| 47 Counties | 32 Counties | 15 Counties |
| | 199 Total Projects | 32 Projects |



ABOVE: Dr. Darin Waters, Deputy Secretary, NC Office of Archives and History; Dr. James W. Clark, President, North Caroliniana Society; Zipporah Tunnage; Dr. Mike Wakeford, Board Chair, North Carolina Humanities and Executive Director, MUSE Winston-Salem; Olivia Stetler. RIGHT: “In Flames: America’s Only Successful Coup” Students: Zipporah Tunnage and Olivia Stetler of Holly Shelter Middle School in New Hanover County



H.G. JONES N.C. HISTORY DAY AWARDS

Since 1998, the North Caroliniana Society has furnished two cash prizes (\$150 each) for student projects in the statewide National History Day Competition for students who create outstanding projects on the state’s history. The H.G. Jones prize is one of eighteen special prizes at the state contest. Congratulations to these recipients of the H.G. Jones Award for North Carolina History:

- **Junior Division exhibit:**

“In Flames: America’s Only Successful Coup” Students: Zipporah Tunnage and Olivia Stetler of Holly Shelter Middle School in New Hanover County (Teacher: Jeffrey Stanek)

- **Senior Division performance:**

“Hang Down Your Head and Cry: The Turning Point Of The American Folk Revival” Student: Isabella Hardy, homeschool student in Avery County (Teacher: Elizabeth Hardy)

continued

NATIONAL CONTEST RESULTS:

- **National History Day Documentary Showcase at the Oprah Winfrey Theater at the National Museum of African American History and Culture:**
“The Day the River Ran Red: The Wilmington Coup of 1898” Student: Abigail Blair from The International School at Gregory in Wilmington (Teacher: Sarah Stepanski)
This was one of 17 documentaries out of 200 that were selected for this event.
- **Attended a writer’s workshop and tour of the White House Visitor Center for his research paper:**
“Citizenship, the 14th Amendment, and Justice” Student: Michael Wei from Davis Drive Middle School in Cary (Teacher: Elizabeth Crowell)
- **8th Place Medal Winner in the Nation in the Junior Group Exhibit Category and On Display in the National Museum of American History and N.C. Outstanding Entry in the Junior Division:**
“In Flames: America’s Only Successful Coups” Students: Zipporah Tunnage and Olivia Stetler from Holly Shelter Middle School in Castle Hayne (Teacher: Jeffrey Stanek)
Zipporah, Olivia and Mr. Stanek spent the day sharing this NC history with Smithsonian Staff and members of the general public. The museum staff also did a special behind the scenes tour of artifacts not on display.
- **5th Place Medal Winner in the Nation in the Senior Individual Performance Category and Arts in History Special Prize and Performance at the National Museum of American History:**
“Hang Down Your Head and Cry: The Turning Point of the American Folk Revival” Student: Isabella Hardy from Gryphon Academy in Crossnore (Teacher: Elizabeth Hardy)
Isabella has competed at the National Contest all seven years of middle and high school.
- **4th Place Medal Winner in the Nation in the Senior Website Project Category and N.C. Outstanding Entry in the Senior Division:**
“The Holodomor: A Turning Point in the History of Genocide” Students: Nishitha Daniel and Abigail Mocharnuk from Early College of Guilford in Greensboro (Teacher: Morris Johnson)
- **6th Place Medal Winner in the Nation in the Senior Individual Website Category:**
“The Vietnam War: A Turning Point for Black American Rights” Student: Kathryne Hong from Durham Academy in Durham (Teacher: Brian Fennessy)
- **Exclusive talk led by famed documentarian Ken Burns:**
Seven of the high school documentary students from Rockingham County Early College High, Early College at Guilford, Chapel Hill High, and Massey Hill Classical High were invited to attend.

PROGRAMS, GRANTS AND PROJECTS



CLOCKWISE from top left: Abigail Blair, Michael Wei, Isabella Hardy, Kathryn Hong, Abigail Mocharnuk

CONTINUING EDUCATION

The National History Day program offers opportunities and scholarships for continuing education for both students and teachers.

In the past school year, N.C. History Day supported seven teachers from various counties across North Carolina by providing them the chance to participate in a professional development webinar focused on teaching students how to develop a historical argument. Additionally, three teachers from other counties took part in a timely online course titled “Revolutionary Ideals,” designed to connect educators with recent historical scholarship on the founding era. This preparation is especially relevant as the nation approaches the 250th anniversary of the Declaration of Independence in 2026.

Moreover, two in-person workshops led by staff from the National History Day national office were conducted in Western North Carolina, specifically aimed at supporting rural teachers in the mountains. These workshops helped teachers utilize the NHD program to develop critical research skills through project-based learning.

This past spring, a student-teacher team from Lenoir County had the opportunity to represent North Carolina at the Young People’s Continental Congress. High school student David Buck and his former middle school National History Day teacher, Chadwick Stokes, participated in a series of webinars conducted by historians that explored the nation’s journey to freedom. They then traveled to Philadelphia in June, where they met with student-teacher teams from the other 12 original colonies. Together, they spent a week visiting historical sites and learned about the events leading up to the original Continental Congress.

PROGRAMS, GRANTS AND PROJECTS

THE NORTH CAROLINA HISTORICAL REVIEW

(funding: Cashion-Steelman Fund)

Since 1924 the North Carolina Historical Review, published quarterly, has been a definitive source for the study and understanding of North Carolina history. Regular features include carefully researched, handsomely illustrated articles that explore North Carolina and southern history from the colonial period to the present and cover a variety of subjects; reviews of books about state, regional, and national history; an annual bibliography of books pertaining to North Carolina subjects; an annual index; and a listing, printed annually, of theses and dissertations related to North Carolina subjects.

The Society continued its support of the North Carolina Historical Review, contributing \$20,000 to the N.C. Department of Natural & Cultural Resources to publish the Review. These funds covered approximately 39% of the total cost of printing and fulfillment of Volume 101 of the Review. For Volume 101, 550 copies were printed for an average of 374 subscribers per issue. The Review is available in electronic form through Ebsco and JSTOR, with some restrictions.



NORTH CAROLINA COLLECTION, WILSON LIBRARY, UNC-CH

The North Carolina Collection is dedicated to preserving literary, visual, and artifactual materials illustrating four centuries of the colony and state of North Carolina. The North Carolina Collection, located in historic Wilson Special Collections Library on the campus of the University of North Carolina at Chapel Hill, traces its origins to the founding of the North Carolina Historical Society in 1844. The collection comprises three divisions.

The North Carolina Collection's Research Library has grown to become the largest collection of printed materials related to a single state. The Research Library's holdings are especially strong in printed materials relating to the history and culture of North Carolina, from the earliest accounts of explorers along the North American coast to present-day books and journals. There are extensive holdings of maps, newspapers, and photographs in the NCC and an unparalleled collection of North Carolina literary works.

The North Carolina Collection Gallery is an exhibition facility and program with more than 50,000 objects in its care. The Gallery, a component of the North Carolina Collection, provides an immersive experience of North Carolina's history and culture through historic rooms, changing exhibitions, and permanent displays.

The North Carolina Collection began collecting photographs in 1929. Today, the North Carolina Collection Photographic Archives contains more than 3,000,000 items, from daguerreotypes to digital photographs. The photographs are descriptive and documentary in nature. They provide a visual record of North Carolina's people, places, and events. Images exist for all 100 of the state's counties.



Jon Cardiner/University Libraries, UNC-Chapel Hill

Wilson Library, University of North Carolina at Chapel Hill

continued

Converting On-Site Exhibits to Traveling Exhibits

(funding: Dana B. Lacy Fund)

The Society continued its support of the North Carolina Collection, contributing \$7,514 to the University Libraries at the University of North Carolina at Chapel Hill for the preparation of North Carolina Collection Gallery exhibitions for installations off-site.

During the year, the Gallery exhibition “We Birthed the Movement!” and “From Afton to Woodland” has traveled to The Kenan Institute for Ethics at Duke University, the Environmental Protection Agency campus at Research Triangle Park, and the University of Mississippi’s Center for the Study of Southern Culture.

Conservation of Sir Walter Raleigh Portrait

(funding: W. Trent Ragland Jr. Fund)

The Society continued its support of the North Carolina Collection, contributing \$5,000 to the University Libraries at the University of North Carolina at Chapel Hill for conservation work on the Sir Walter Raleigh Portrait, housed at the North Carolina Collection Gallery.

With this grant, the NC Collection contracted with a conservator to assess the painting and provide recommendations. After restoration work is done, the painting will be reframed, in a reproduction frame appropriate for the period, and will be reinstalled in the North Carolina Collection Gallery in early 2025.



Sir Walter Raleigh, oil on board, circa 1593

Online Exhibits Project

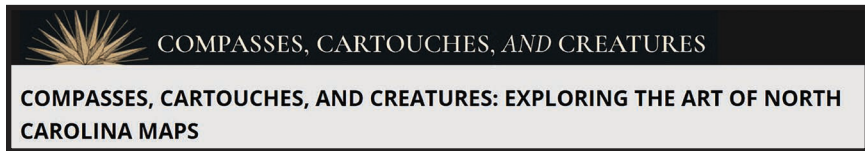
(funding: W. Trent Ragland Jr. Fund)

The Society continued its support of the North Carolina Collection, contributing \$18,651 to the University Libraries at the University of North Carolina at Chapel Hill for their ongoing online exhibits project.

With this grant, the NC Collection continued employment of a curatorial specialist to create online exhibits promoting North Carolina history and culture to web users around the world, and an online database of North Carolina Collection Gallery objects. The North Carolina Collection will continue to share its rich collection of such materials as books, postcards, newspapers, photographs, and three-dimensional objects via online exhibits and online database of objects.

Check out these additions to the online exhibits:

- **Compasses, Cartouches, and Creatures:**
Exploring the Art of North Carolina Maps
<https://unc.live/4ek9izY>



- **The Lost Colony Film: North Carolina's First Educational Movie**
<https://unc.live/48z44PE>



PORTRAITS OF CLIMATE CHANGE IN NC: SNAPSHOTS AND STORIES OF A TRANSFORMING STATE

(funding: Archie K. Davis Fund)

The Portraits of Climate Change initiative is a collaboration between the journal Southern Cultures, Carolina Public Humanities, and NC Community Colleges.

Carolina Public Humanities (formerly the Program in the Humanities and Human Values) is a unit of the University of North Carolina Chapel Hill College of Arts and Sciences. Carolina Public Humanities serves North Carolina by connecting the University's faculty and resources with communities in our hometown and throughout the state.

In 2023, the Society supported the Portraits of Climate Change initiative, contributing \$19,900 to Carolina Public Humanities as part of their continuous commitment to connect the scholars and resources of the University with communities throughout the state, working primarily with community colleges and state historic sites.

Partnering with the College of the Albemarle and Pitt Community College and corresponding faculty liaisons, Carolina Public Humanities helped to structure and advertise photo contests that invited community college students, high school students, and the broader public to capture images of what climate change looks like in their communities. In addition, lesson plans and activities were developed and distributed.

In the fall of 2023, *Southern Culture* published an issue focused on photographs of climate change from around the South, "Snapshot: Climate." As part of the project, 100 copies of "Snapshot: Climate" to schools for classroom use.

Link: <https://www.southerncultures.org/article/snapshots/>

Gallery exhibits at the College of Albemarle and Pitt Community College were set up to showcase photographs from *Southern Culture's* "Snapshot: Climate" issue and from local photography contests. One other gallery exhibit is planned for spring 2025.

PROGRAMS, GRANTS AND PROJECTS



February 8, 2024 at Pitt Community College: Scott Temple, faculty member in the Pitt CC Department of English and Humanities; Jeremy Galang, First Place Award in the Student Category, for a photo entitled “When Hail Meets Harvest;” Spencer George, keynote speaker and a Master’s Student in Folklore at UNC, Chapel Hill; Lloyd Kramer, Director, Carolina Public Humanities; Eloise Clark, First Place Award in the General Public Category, for a photo entitled “Bones;” Anna Lane, Second Place Award in the Student Category, for a photo entitled “Algae Blooms on the Chowan River” (Hunter Shrader, Third Place Award in the Student Category, for a photo entitled “Ghost” was not present)



February 8, 2024 at Pitt Community College: Audience responding to the presentation by Adams Fellow, Spencer George, keynote speaker, a Master’s Student in Folklore at UNC, Chapel Hill, and one of the current Maynard Adams Fellows at Carolina Public Humanities

WILLIAM FRIDAY TEACHER EDUCATION INITIATIVE

(funding: H.G. Jones Restricted, William S. Powell, Archie K. Davis, William C. Friday, Alice and Jerry Cotten, NC Society Book, and H.G. Jones Funds)

In 2016, committed to supporting our state's K-12 teachers, the Society and Carolina K-12, a program of Carolina Public Humanities at UNC-CH, developed the William Friday Teacher Education Initiative, with the goal of equally educating and appreciating our state's hard-working educators through free, quality professional development events and resources.

ANNUAL WILLIAM FRIDAY TEACHER RETREATS :

These unique retreats provide K-12 teachers with three dynamic days to learn about North Carolina's captivating history, literature, and culture in an academic, professional and celebratory retreat atmosphere.

Each agenda strategically integrates:

- *Presentations on compelling topics from North Carolina history, literature, culture, current events, and more, from engaging scholars, authors & performers in order to deepen participant's content knowledge*
- *Interactive exploration of innovative teaching strategies and coordinating lesson plans to help teachers translate what they learn to their K-12 students*
- *Immersive experiences (tours, museum visits, performances, etc.) that connect to program themes*
- *Exploration of primary sources and online resources from UNC-Chapel Hill Libraries, such as Wilson Library's North Carolina Collection*
- *Time for discussion and collaboration among attending teachers, a rarity in the hectic schedules of educators, but crucial for forging a network of teacher support around the state*
- *Constant affirmation and appreciation of attending teachers and the challenges they face*

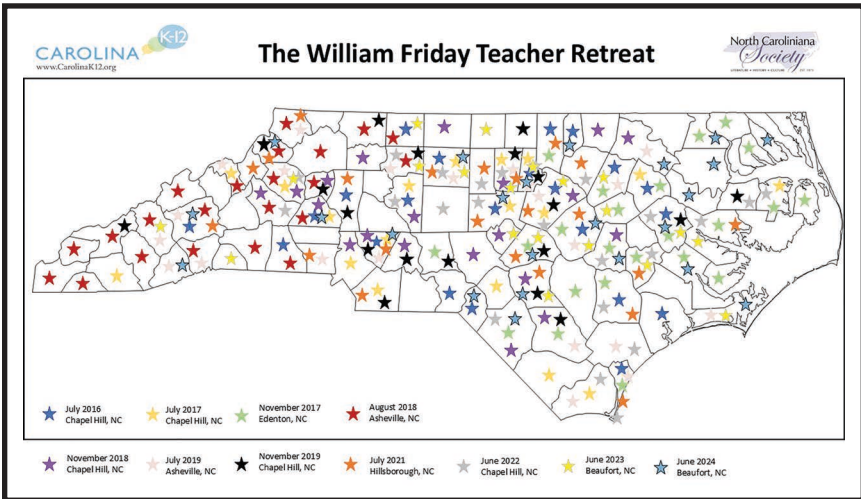
The Society continued its support of The William Friday Teacher Education Initiative, contributing \$40,000 to Carolina Public Humanities as part of their continuous commitment to provide support to North Carolina students and teachers.

In June 2024, Carolina K-12, the North Caroliniana Society, and the NC Department of Natural & Cultural Resources served 42 teachers from 23 counties at the annual William Friday Teacher Retreat. This special group of educators were treated to three full days of learning and fun “down east,” in Beaufort, Harkers Island, and Cape Lookout. In addition to plenty of pampering at the Beaufort Inn, participants deepened their content and pedagogical knowledge, hearing from decorated scholars and local experts. Some highlights include:

PROGRAMS, GRANTS AND PROJECTS

- a powerful gospel performance by singer/scholar, Mary D. Williams,
- a private tour of Harkers Island and Cape Lookout, followed by a “family supper” with Maritime Historian and Director of the Core Sound Waterfowl Museum & Heritage Center, Karen Amspacher ,
- “behind-the-scenes” visits to the NC Maritime Museum and the Bonehenge Whale Center,
- A double-decker bus tour of historic downtown Beaufort,
- A lavish teacher appreciation dinner with comments from North Caroliniana Society President Dr. Jim Clark, North Carolina Department of Natural and Cultural Resources Secretary Reid Wilson, and Friday Retreat Honoree Todd Miller, and
- A rousing closing session from Dr. Terry Roberts that left the teachers energized and ready to start a new school year right there!

To date, 382 public school teachers from 86 NC counties have participated in the annual William Friday Teacher Retreats. These teachers will reach a minimum of 53,480 K-12 students each school year. Since 2022, an additional 670 North Carolinians have been reached through other events sponsored by the Society in partnership with Carolina K-12.



Find links on the Society’s website to articles written about the 2024 William Friday Teacher Retreat.

- Public Ed Works published an article written by North Caroliniana Society Board member Eric Johnson, “Teaching a Love of North Carolina.”
- Carolina Arts & Sciences magazine published an article written by Kim Weaver Spurr, “Down East’ immersion enriches K-12 teachers’ N.C. knowledge and spirits”

continued

PROGRAMS, GRANTS AND PROJECTS

TESTIMONIALS FROM INITIATIVE PARTICIPANTS:

From the bottom of my heart, thank you. We're told 'we see you, we hear you, we know what you're going through' all the time, but no one acts on it—not like this! These three days renewed my faith in the belief that there are people out there who still feel that my work is valued and important. This is especially important right now when good teachers are leaving the profession in droves. Happy, valued educators are more likely to remain positive in the classroom, which is ultimately better for the students.

— CABARRUS COUNTY TEACHER

Thank you! Thank you! Thank you! It means so much to have free professional development and to be appreciated as a teacher. These are the kinds of experiences that can keep teachers in the profession, remind them of their power, and recharge their battery for the next school year and hopefully more years to come.

— HARNETT COUNTY TEACHER

Top six photos by Jess Able, UNC College of Arts and Sciences



Beaufort, NC July 2024: William Friday Teacher Retreat: Carolina Voices: Enriching the Mind, Rejuvenating the Spirit.

Minutes of a Meeting of the Board of Directors

OCTOBER 4, 2023
GEORGE WATTS HILL ALUMNI CENTER
CHAPEL HILL, NC

Pursuant to notice duly given, President James W. Clark Jr. called a meeting of the Board of Directors of the North Caroliniana Society, Inc. to order at 12:16 p.m. on Wednesday, October 04, 2023.

Present in addition to the President were Vice Presidents Bland Simpson and Alice R. Cotten, Treasurer Leslie Dula McKesson, President *emeritus* Willis P. Whichard, and the following members of the Board of Directors: Margaret C. Bauer, Jeffrey J. Crow, Tom Earnhardt, Georgann Eubanks, Emily Williamson Gangi, Rebecca Godwin, Anna Hayes, Terry Roberts, C. Edward Teague III, and Thomas E. Terrell Jr. Also present were *ex officio* directors Jason Tomberlin, Interim Curator of the North Carolina Collection of the University of North Carolina Library and Assistant Treasurer and Lloyd Kramer, Director of Carolina Public Humanities. In the absence of Secretary Patrick Wooten, Rebecca Godwin took notes during the meeting.

President Clark welcomed those present and asked Executive Director Cain to proceed with items on the Board of Directors Meeting agenda.

Mr. Whichard offered a correction to the minutes of the Board of Directors meeting held on May 25, 2023. On motion of Mr. Terrell, seconded by Mr. Earnhardt, the minutes were approved as amended.

Executive Director Cain introduced Ms. Susan Glendenning of Maddison & Caison for presentation of the draft review of the 2022-2023 Audit Report and Financials and Form 990. Ms. Glendenning clarified that the full audit resulted in a clean report, the best that Maddison & Caison can issue. She reviewed sections and notes of the report, including modified cash basis, comparison to last year, the net unrealized loss, Note 4: \$799,715 liquidity amount, and restricted funds. Ms. Glendenning noted that the North Caroliniana Society's Treasurer needs to stay vigilant, being an important role in the internal control for finances. Ms. Glendenning has prepared letters to the Society's Board reporting that Maddison & Caison found no concerns during the audit. Ms. Glendenning has completed, pending one part, Form 990. Executive Director Cain will send the final 2022-2023 Audit Report and Financials, letters to the Board, and the Form 990 to the Board via email for a vote later in October.

continued

MINUTES

Dr. Crow asked Ms. Glendenning if the Society has Directors insurance. The answer is yes.

Mr. Teague, referring to Note 7 in the report, asked if the Society has a written investment policy. Executive Director Cain replied that the Board will review written policies during the May 2024 meeting. She does not know of a written investment policy at this point.

Mr. Teague asked Ms. Glendenning if she recommends any changes, particularly concerning whether someone might sign off on checks that Executive Director Cain writes over a certain amount or considering dual authority with Wells Fargo or UNC Investment Fund (UNC IF). Ms. Glendenning explained that a good tool is simply watching budget-to-actual reports and the bank reconciliation reports.

Vice President Simpson asked Executive Director Cain to explain their recent conversation about reinvestment: each year, the Society receives a distribution from UNC IF, and he asked whether there is a reason that the Society should reinvest a portion of those funds to grow and protect principal. Executive Director Cain explained that the UNC IF management team has already thought about the future as they calculate the annual distribution amount. Executive Director Cain and Ms. Glendenning referenced the Spending Distribution Policy published in the UNC IF's Annual Report.

Discussion continued regarding how much the Society is required to spend, as it relates to the UNC IF distribution. Ms. Glendenning responded that the Society is not bound to a specific spending formula. She explained that the Society should act like a 501-C, a charity, not a private foundation, as we currently do, including on the income side, meeting the Public Support Test, where more than 33 1/3% of the Society's support comes from "grassroot" efforts.

Discussion continued on the strategy of growing the corpus of the Society's investments. An inflation protection strategy was discussed so as to continue to have similar distribution amounts from year-to-year. The idea to raise funds to grow the corpus was revisited also in the conversation.

Executive Director Cain pointed Board members to the Programs, Grants, and Projects report distributed by email and provided at the meeting. The report includes last year's support of Archie K. Davis Fellowships, History Day and the H.G. Jones Awards, 100th volume of the North Carolina Historical Review, North Carolina Collection's newspaper digitization and online exhibits projects, and the William Friday Teacher Initiative, including an annual in-person teacher retreat in Beaufort.

Dr. Kramer distributed a list of comments from teachers participating in the 2023 William Friday Teachers Retreat in Beaufort, adding that Vice President Simpson, who arranged schedules to accommodate an impressive range of events, was a major contributor to the event's success, as comments reflect. Dr. Kramer explained that the virtual events are also very popular. Dr. Kramer thanked his colleague Christie Norris for helping with the events and emphasized that the Society can affirm that the programs are working.

Discussion continued about how important the programs for teachers are. Dr. Kramer shared that Mr. Phil Baddour and friends have raised \$35,000 to send Goldsboro teachers to retreats modeled after the Society's retreats.

At the request of President Clark, Mr. Whichard reviewed the history of the Friday retreats, saying that they were Dr. William Friday's idea. Dr. H.G. Jones wanted to establish a fund to honor Bill Friday after he served as North Caroliniana Society President. Mr. Whichard, then Society President, drew up a proposal to use the Friday fund to help teachers instructing students in the literature, culture, and history of the state. Mr. Whichard created a list of possible partners that included the UNC Program in the Humanities that later became Carolina Public Humanities. He tried to get Mr. Friday to attend the 2012 annual meeting of the Society to surprise him with the Friday fund and teacher retreat plans. Mr. Friday suffered a heart attack before that meeting but did read the purpose clause of the proposal and expressed his approval.

Mr. Kramer ended our discussion of the Friday retreats by pointing to participants' comments about learning things they never knew about NC history.

Executive Director Cain shared the last project update – the previously funded project with Office of Archives and History and NC African American Heritage Commission. Dr. Crystal Sanders and Dr. Warren Milteer Jr., are updating *A History of African Americans in North Carolina*, a book that Mr. Crow, Paul Escott and Flora Wadelington revised in 2002. The new update will appear in 2025.

Mr. Teague shared that the Grants Review Committee has just begun this year's work. He has asked grant applicants to define what the success of their project will be. He hopes that the Board will give a more critical review of grant projects in the future. Executive Director Cain will help the committee to add "meatier" items on applications.

Executive Director Cain reminded Board members that the Board did not approve all *North Carolina Historical Review (NCHR)* grant requests from May 2023. In May 2023, the Board tasked the Executive Committee to meet with the NCHR management team to discuss and decide on a revised grant request. Mr. Teague asked about the details of the approved \$20,000 for *NCHR* publication. Discussion of the grant request continued with questions regarding the copyeditor position, the debate over moving the publication to an online only publication, costs of printing and mailing, and the new online subscription system.

Executive Director Cain asked for comments on the May 25, 2023, event. A few items of note were shared: event was a success; staying in one room for the business meeting and dinner worked well; suggested programs be focused on North Carolina; and locations other than Chapel Hill should be considered.

Executive Director Cain moved to the 2024 Society Award nominees and asked President Clark to preside over the discussion. President Clark asked if there were other nominations beyond the five included in the Board meeting packet.

continued

MINUTES

None were offered. Mr. Earnhardt, a nominee, left the room during consideration of the nominees.

Board members discussed each of the five nominees. Mr. Terrell asked what criteria the Board uses to select the award winner. Mr. Whichard said that we have no written policy describing the criteria, leading Executive Director Cain to read the description of the award identifying “long and distinguished service in the encouragement, production, enhancement, promotion, and preservation of North Carolina’s heritage” as the standard.

President Clark asked for a motion on the Society Award.

On motion of Ms. Gangi, seconded by Dr. Bauer, Dr. Kevin Cherry and Dr. Jo Ann Chavis Lowery were accepted as the 2024 North Caroliniana Society Award recipients. Discussion followed. Mr. Teague proposed an amendment to the motion, clarifying that Dr. Cherry and Dr. Lowery would be honored at separate events at separate times. Mr. Terrell requested that we ask Dr. Lowery to join the Society, as previously discussed. All voted yes for the amended motion.

In reference to holding two award events, Executive Director Cain reminded us that our fiscal year ends June 30. If we hold the Dr. Lowery event in fall 2024, its cost will be part of the 2024 budget.

Further discussion confirmed that the Lumbee community would be invited to attend the Dr. Lowery celebration.

President Clark announced that he has informed the Executive and Nominating Committees that he will step down from his position in May 2024. Executive Director Cain shared member updates. See [Appendix A](#). The Nominating Committee will meet in February to consider member and officer nominations. Vice President Simpson affirmed that the committee appreciated getting information about people nominated for Society membership with the nominations. The Society aims to grow to 260 this year.

Executive Director Cain reviewed Strategic Plan Committee documents distributed and clarified that the Board will vote to approve the Strategic Plan at the spring 2024 meeting. Discussion continued regarding the Strategic Planning process, and the need to retain a professional facilitator.

On motion of Mr. Teague, seconded by Mr. Earnhardt, the Strategic Planning Committee will move to retain a professional facilitator to help with planning and may expand the timeline of the planning process. The motion was approved.

Executive Director Cain has been working with several members to create an updated/enlivened “description” of the Society. As progress is made, she will share with the Board and the Strategic Planning Committee.

Executive Director Cain shared that two groups reached out to the Society, outside of the normal grant cycle, regarding these projects: the Pauli Murray Center for History and Social Justice Teaching Fellowships and Professor Robert Allen’s plans for the Histories of Insanity Initiative. Information regarding each project was included in the Board packet. Executive Director Cain will inform each of the Society’s normal grant cycle.

President Clark announced the phased closing of Wilson Library for construction and safety updates. He has requested a schedule of the closing. Mr. Tomberlin offered information regarding the current, and fluid, plans for accessing documents and digitization, and of the expected 18 month closure of Wilson Library. Discussion continued with many questions regarding the closure.

Mr. Teague asked Mr. Tomberlin how the Society could support his work during the phased closing. Mr. Tomberlin replied that the Society's assistance with digitization is helping. He hopes that public events normally held in Wilson Library will be held at other UNC buildings or at venues around the state. Mr. Teague asked whether we should invest in physical structures in Wilson Library to improve spaces while the building is already under renovation. State funding will cover most (not all) of the infrastructure and scheduled renovations. No motion was made concerning additional updates to physical structures that the Society might support.

Concerning extra copies of prior year imprints, Executive Director Cain shared that she has given some away. She has not given away any copies of *Hayes: The Planation, Its People and Their Papers*. She has sixty copies of this imprint. Dr. Crow moved that we give the Office of Archives and History the remaining copies of this Hayes imprint subject to keeping ten copies to send to the group in Edenton supporting Hayes. Ms. Hayes seconded the motion. After discussion, Executive Director Cain explained that she keeps five copies of every imprint. The motion passed.

Next year's calendar items were reviewed. The Spring Board meeting date, with the Annual Meeting and Awards Banquet, will be determined in consultation with the honoree, Dr. Cherry. The Fall meeting will be Wednesday, October 2, 2024. Dr. Bauer suggested that September 12, 2024, beginning the 50th year of the Society, might be a good date to honor Dr. Lowery.

President Clark asked if there was any further business. Ms. Eubanks called our attention to the recently published book by Paul Green's grandson, Paul M. Green: *The Thief, The Senator, and The Knight of the Bleeding Heart: John Stephens & the Ku Klux Klan in Reconstruction North Carolina*. Ms. Cotten announced that Society member Walter Turner died the week prior to this meeting.

The meeting was adjourned at 2:50 p.m.

APPENDIX A
NORTH CAROLINIANA SOCIETY
MEMBERSHIP UPDATE:
RESIGNATIONS, NECROLOGY AND COUNT

NECROLOGY:

- Susan Taylor Block (d. 10/29/2022)
- Philip Gerard (d. 11/7/2022)
- Betty Ray McCain (d. 11/23/2022)
- Elizabeth F. Buford (d. 2/27/2023)
- H. David Bruton (d. 8/18/2023)
- Memory F. Mitchell (d. 8/21/2023)

RESIGNATIONS (SHOWN IN ANNUAL REPORT AS OF JUNE 30, 2023):

- Todd L. Miller

MEMBERSHIP COUNT:

- 253

Minutes of a Meeting of the Board of Directors

APRIL 24, 2024
THE CAROLINA INN
CHAPEL HILL, NC

Pursuant to notice duly given, President James W. Clark Jr. called a meeting of the Board of Directors of the North Caroliniana Society, Inc. to order at 12:08 p.m. on Wednesday, April 24, 2024. Present in addition to the President were Vice Presidents Bland Simpson and Alice R. Cotten, Secretary-Treasurer Patrick S. Wooten, President *emeritus* Willis P. Whichard, and the following members of the Board of Directors: Margaret D. Bauer, Kevin Cherry, Jeffrey J. Crow, Tom Earnhardt, Emily Williamson Gangi, Rebecca Godwin, Anna R. Hayes, Eric L. Johnson, Leslie Dula McKesson, Terry Roberts, and C. Edward Teague III. Also present were *ex officio* directors Jason Tomberlin, Interim Curator of the North Carolina Collection of the University of North Carolina Library, and Lloyd Kramer, Director of Carolina Public Humanities. Thomas E. Terrell's proxy was given to Vice President Bland Simpson.

President Clark welcomed those present and asked new Board member Eric L. Johnson to share a bit about himself, and his task of working with Lynn Roundtree to prepare a draft of a Strategic Plan for the Board's review. President Clark thanked Jeffrey J. Crow, who is stepping down from the Board, for his service as a Board member. President Clark also announced that with the dissolution of the role of Assistant Treasurer, Jason Tomberlin remains as an *ex officio* member of the Board.

On motion of Mr. Crow, seconded by Mr. Roberts, the minutes of the Board of Directors meeting, held on October 4, 2023 in Chapel Hill, were approved as read.

On motion of Mr. Crow, seconded by Mr. Roberts, Board actions via email from July 1, 2023 to April 24, 2024, listed in [Appendix A](#), were ratified.

President Clark asked Executive Director Cain to review the Society's list of active Committees and members of these committees. On motion of Ms. Gangi, seconded by Ms. McKesson, a member of the Nominating Committee should be added, and should be from the western part of the state. After discussion, the motion was approved.

continued

MINUTES

Executive Director Cain reminded Board members that they are asked annually to review and sign the Conflict of Interest policy.

Vice President Simpson reviewed the previous year's Continuing Resolutions with the Board. Discussion continued regarding safeguarding the Society's assets. It was suggested that the Budget Committee and Executive Committee will continue this conversation to report back to the Board for a vote on the Continuing Resolutions.

Secretary-Treasurer Wooten shared two new policies: Document Retention Policy ([Appendix B](#)) and Whistleblower Policy ([Appendix C](#)). On motion of Mr. Crow, seconded by Mr. Roberts, the policies were approved.

Mr. Cherry, member of the Nominating Committee, shared an update on Members, Board of Directors, and Officers, included in [Appendix D](#).

Mr. Cherry asked for Jim Clark to be considered a President Emeritus, and Jeffrey J. Crow to be considered a Director Emeritus. The Committee proposal was approved.

Mr. Cherry, member of the Nominating Committee, placed into nomination the following officers. The slate was approved.

- Bland Simpson, *President*
- Alice Cotten, *Vice President*
- Terry Roberts, *Vice President*
- Patrick S. Wooten, *Secretary-Treasurer*

President Clark paused the meeting for a five minute break.

Executive Director Cain reminded Board members that Society documents and files are available in a Google Drive folder set up for Board members.

Executive Director Cain reviewed several financial documents found in the Google Drive folder, including a draft of a "Financial FAQ".

Executive Director Cain offered updates on the grants paid out during this fiscal year. She also offered updates on the outstanding NCAAHC Book project (publication date expected in 2025) and a new collaboration with Phil Baddour and a group of Wayne County supporters for this summer's Friday Teacher Retreat.

Mr. Teague, Chair of the Grant Request Review Committee, shared his committee's feedback on the grant applications received, a list of which is attached to these minutes as [Appendix E](#).

Secretary-Treasurer Wooten, Chair of the Budget Committee, presented the July 1, 2024-June 30, 2025 budget, attached to these minutes as [Appendix F](#). Discussion followed and three amendments were suggested:

- USES: Continued Support: North Carolina Historical Review – change to \$14,000
- USES: Special Programs & Projects: NC Collection – nitrate photographs – \$66,667 (a commitment of only one year’s funding – not the full three-year commitment)
- USES: Special Programs & Projects: add NC Literary Review – \$10,000 (as a one-time commitment)

On motion of Mr. Teague, seconded by Mr. Cherry, the motion to approve the Budget, as amended, was approved.

Executive Director Cain reminded the Board to submit nominations to her for the annual Society Award honoree by September 1, 2024.

Executive Director Cain presented the proposed Agenda for the Annual Membership Meeting commencing at 4:00pm that afternoon. The President’s Report is included on the back of the Agenda.

Board members were asked to mark their calendars for the Sunday, October 6, 2024 in Pembroke, NC, as the next Society Board meeting. The meeting will be before the Society’s additional 2024 Society Award celebration, honoring Dr. Jo Ann Chavis Lowery.

The meeting was adjourned at 2:59 p.m.

APPENDIX A
NORTH CAROLINIANA SOCIETY
BOARD ACTIONS BY EMAIL
JULY 1, 2023 TO APRIL 24, 2024

With majority or unanimous approval, the following actions were approved by the Board of Directors via email during the year.

- OCTOBER 23, 2023
Officer Change – Patrick Wooten as Secretary-Treasurer - APPROVED
 - Patrick Wooten was approved in the dual role of Secretary-Treasurer

- OCTOBER 26, 2023
Acceptance of the Audited Financials and Form 990 - APPROVED
 - The Society's June 30, 2023 Audited Financials and Form 990, prepared by Maddison & Caison, were circulated for review and acceptance.

- FEBRUARY 26, 2024
Society Member nominees and a new Board member – APPROVED

Society Members (12)

- Ann Woodford - Andrews, NC
- Maria Henson - Winston-Salem, NC
- Freda Porter - Pembroke, NC
- James Williams - Carrboro, NC
- Eric Medlin - Raleigh, NC
- K. Todd Johnson - Smithfield, NC
- Dan Morrill - Charlotte, NC
- Ken Howard - Raleigh, NC
- David Routh - Chapel Hill, NC
- Robert "Bobby" Allen - Durham, NC
- Mark Hewitt - Pittsboro, NC
- Luther Hodges Jr.

Board Member

- Eric L. Johnson

APPENDIX B

NORTH CAROLINIANA SOCIETY DOCUMENT RETENTION POLICY

With majority or unanimous approval, the following actions were approved by the Board of Directors via email during the year.

- **ARTICLE I**
PURPOSE

The purposes of this document retention policy are for North Caroliniana Society (the “Organization”) to enhance compliance with the Sarbanes-Oxley Act and to promote the proper treatment of corporate records of the Organization.

- **ARTICLE II**
POLICY

Section 1. General Guidelines. Records should not be kept if they are no longer needed for the operation of the business or required by law. Unnecessary records should be eliminated from the files.

From time to time, the Organization may establish retention or destruction policies or schedules for specific categories of records in order to ensure legal compliance, and also to accomplish other objectives, such as preserving intellectual property and cost management. Several categories of documents that warrant special consideration are identified below. While minimum retention periods are established, the retention of the documents identified below and of documents not included in the identified categories should be determined primarily by the application of the general guidelines affecting document retention, as well as the exception for litigation relevant documents and any other pertinent factors.

Section 2. Exception for Litigation Relevant Documents. The Organization expects all officers, directors, and employees to comply fully with any published records retention or destruction policies and schedules, provided that all officers, directors, and employees should note the following general exception to any stated destruction schedule: If you believe, or the Organization informs you, that Organization records are relevant to litigation, or potential litigation (i.e., a dispute that could result in litigation), then you must preserve those records until it is determined that the records are no longer needed. That exception supersedes any previously or subsequently established destruction schedule for those records.

continued

Section 3. Minimum Retention Periods for Specific Categories.

(a) Organizational Documents. Organizational records include the Organization's articles of incorporation, by-laws and IRS Form 1023, Application for Exemption. Organizational records should be retained permanently. IRS regulations require that the Form 1023 be available for public inspection upon request.

(b) Tax Records. Tax records include, but may not be limited to, documents concerning payroll, expenses, proof of contributions made by donors, accounting procedures, and other documents concerning the Organization's revenues. Tax records should be retained for at least seven years from the date of filing the applicable return.

(c) Employment Records/Personnel Records. State and federal statutes require the Organization to keep certain recruitment, employment and personnel information. The Organization should also keep personnel files that reflect performance reviews and any complaints brought against the Organization or individual employees under applicable state and federal statutes. The Organization should also keep in the employee's personnel file all final memoranda and correspondence reflecting performance reviews and actions taken by or against personnel. Employment applications should be retained for three years. Retirement and pension records should be kept permanently. Other employment and personnel records should be retained for seven years.

(d) Board and Board Committee Materials. Meeting minutes should be retained in perpetuity in the Organization's minute book. A clean copy of all other Board and Board Committee materials should be kept for no less than three years by the Organization.

(e) Press Releases/Public Filings. The Organization should retain permanent copies of all press releases and publicly filed documents under the theory that the Organization should have its own copy to test the accuracy of any document a member of the public can theoretically produce against the Organization.

(f) Legal Files. Legal counsel should be consulted to determine the retention period of particular documents, but legal documents should generally be maintained for a period of ten years.

(g) Contracts. Final, execution copies of all contracts entered into by the Organization should be retained. The Organization should retain copies of the final contracts for at least three years beyond the life of the agreement, and longer in the case of publicly filed contracts.

(h) Correspondence. Unless correspondence falls under another category listed elsewhere in this policy, correspondence should generally be saved for two years.

(i) Banking and Accounting. Accounts payable ledgers and schedules should be kept for seven years. Bank reconciliations, bank statements, deposit slips and checks (unless for important payments and purchases) should be kept for three years. Any inventories of products, materials, and supplies and any invoices should be kept for seven years.

(j) Insurance. Expired insurance policies, insurance records, accident reports, claims, etc. should be kept permanently.

(k) Audit Records. External audit reports should be kept permanently. Internal audit reports should be kept for three years.

Section 4. Electronic Mail. E-mail that needs to be saved should be either:

- (i) printed in hard copy and kept in the appropriate file; or
- (ii) downloaded to a computer file and kept electronically or on disk as a separate file.

The retention period depends upon the subject matter of the e-mail, as covered elsewhere in this policy.

APPENDIX C

NORTH CAROLINIANA SOCIETY WHISTLEBLOWER POLICY

- **1. PURPOSE**

North Caroliniana Society (“Client”) adopted this Whistleblower Policy (“Policy”) to facilitate open and honest communication concerning its governances, finances, and compliance with law, policy, and ethical principles. This Policy applies to all directors, officers, employees, and volunteers of Client (collectively, “Client associates”).

- **2. REPORTING CONCERNS**

Every Client associate is encouraged to report under this Policy any concerns about any Client activities that they believe, in good faith, to be illegal, unethical, questionable, or contrary to Client policies. These matters include, without limitation, violations of law; fraud, theft, or embezzlement; improper financial transactions or use of Client assets; accounting, internal controls or auditing irregularities such as undocumented transactions or misleading financial reporting; kickbacks; improper concealment or destruction of Client records; breach or alleged breach of data security or confidentiality protocols; tampering with databases or other information technology systems; harassment or discrimination; unsafe working conditions; and violations of Client’s conflict of interest policy.

- **3. WHERE TO REPORT**

If at any time a Client associate has such a concern, the Client associate may raise the concern directly by speaking with the Executive Director. Alternatively, if they are not comfortable speaking with the Executive Director or do not believe the concern has been properly addressed, the Client associate may report the concern to the President. If the subject of a report involves the President, the Client associate may report such concern to any other Board member. Client encourages Client associates making a report to identify themselves in order to facilitate the investigation, but Client associates may make reports anonymously.

- **4. CONFIDENTIALITY AND COOPERATION**

Client will treat a report under this Policy as confidential, subject to and limited by the need to investigate, obtain legal advice and act in consultation with counsel, prevent or correct the action, and comply with applicable laws. Reporting individuals are expected to act in good faith, cooperate in internal investigations, and provide truthful information in connection with any governmental, law enforcement, or other inquiry or investigation.

- **5. NON-RETRALIATION FOR REPORTING OR REFUSING TO ACT**

Client, or any person acting on behalf of Client, will not (a) discharge, demote, suspend, discipline, harass, discriminate, or otherwise retaliate against any Client associate or (b) report or threaten to report to a federal, state, or local agency the suspected citizenship or immigration status of any Client associate, prospective or former Client associate, or any family member of such Client associate (“family member”) if:

- the Client associate or a family member has in good faith disclosed, or Client

believes that the Client associate has disclosed or may disclose, information under this Policy to (i) a government or law enforcement agency, (ii) an Client associate who has authority over such associate, or (iii) another Client associate who has authority to investigate or correct the problem, if the Client associate has reasonable cause to believe that the information discloses a violation of or non-compliance with any law, a violation of any Client policy, or otherwise involves conduct that is unethical;

- the Client associate or a family member has provided information to, or testified before, any public body conducting an investigation, hearing, or inquiry, if the Client associate has reasonable cause to believe that the information discloses a violation of or non-compliance with any law;
- the Client associate or a family member has exercised his or her rights as a whistleblower in any former employment;
- the Client associate or a family member has refused, or may refuse, to participate in an activity that would result in a violation of or noncompliance with law; or
- the Client associate has engaged in lawful acts in furtherance of an action under, or to stop acts in violation of, the federal or California False Claims Acts.

If a Client associate believes that they have been subject to any such retaliation, discrimination or other adverse action by Client, the Client associate should report such action as set out in Section 3. Any Client associate who engages in such retaliation may be subject to disciplinary action, up to and including termination of employment.

For purposes of this policy, the term “law” includes federal and state statutes, and federal, state, and local rules and regulations.

- **6. INVESTIGATION AND ACTION**

Client will investigate reports under this Policy, and any reports of related retaliation or discrimination, and take such corrective and other actions, including consulting with counsel and follow-up communication with the reporting Client associate, as it believes is appropriate under the circumstances.

continued

MINUTES

- 7. NO IMPACT ON EMPLOYMENT STATUS

This Policy is not an employment contract and does not modify the employment relationship between Client and its employees. It does not change the fact that employees of Client are employees at will.

- 8. OTHER LAWS AND POLICIES

This Policy is intended to supplement and not supersede (a) federal and state laws, including, without limitation, Sections 98.6, 244, or 1102.5 of the California Labor Code, Section 12653 of the California Government Code, and Section 1107 of the Sarbanes-Oxley Act, (b) government or other contracts that may include applicable requirements, or (c) Client policies including, without limitation, those relating to harassment, discrimination, or personnel matters.

- 9. AMENDMENT

The Board may amend this Policy at any time.

APPENDIX D

NORTH CAROLINIANA SOCIETY MEMBERS, BOARD AND OFFICERS UPDATE

MEMBERS

NECROLOGY:

- Walter R. Turner (October 2, 2023) member since 2010
- Edwin M. Yoder Jr. (November 30, 2023) member since 1991
- Fred Chappell (January 4, 2024) member since 2000
- Lila Ponder Friday (January 20, 2024) member since 2014
- John C. Martin (April 9, 2024) member since 2023

FEBRUARY 2024 – NEW MEMBER NOMINEES

(approved by Board via email vote February 2024)

Accepted:

- Bobby Allen
- Maria Henson
- Mark Hewitt
- Luther Hodges Jr.
- Ken Howard
- Todd Johnson
- Eric Medlin
- David Routh
- James E. Williams Jr.
- Ann Miller Woodford

APRIL 2024 MEMBERSHIP COUNT:

- 258

MINUTES

BOARD OF DIRECTORS

RESIGNATION

On January 8, 2024, via email, Jeff Crow shared his plan to resign at the end of this year.

FEBRUARY 2024 – NEW BOARD MEMBER NOMINEE

(approved by Board via email vote February 2024)

Eric L. Johnson

EX-OFFICIO CHANGE

With the retirement of Lloyd Kramer from Carolina Public Humanities, the new Director of Carolina Public Humanities, Victoria Rovine, will join the Society Board as an ex officio member.

OFFICERS

RESIGNATIONS

At the October 4, 2023 Society Board meeting, Jim Clark announced he would be stepping down from the position of President.

Spring 2024, Jason Tomberlin offered his resignation as Assistant Treasurer of the Society.

APPENDIX E

NORTH CAROLINIANA SOCIETY SUMMARY – GRANT REQUESTS RECEIVED MARCH 8, 2024

This is a list of requests received for the fiscal year ending June 30, 2025.
(Grant Request Forms for each follow this summary.)

TOTAL: \$226,143

NC Office of Archives & History (NCOAH) \$35,000

- National History Day (Federation of NC Historical Societies): \$18,000
- NC Historical Review – publishing: \$17,000

NC Collection \$119,243

Ragland payout (last year \$23,651.80)

Lacy payout (last year \$7,514.26)

- NCC Gallery Digital Exhibits: \$17,680
- Primary Sources Teaching Fellows for NC Heritage: \$34,896
- Nitrate Photographic Film Scanning & Accessibility Project: \$66,667
(3 year commitment – \$200,000 – \$66,667/year)

Carolina Public Humanities \$61,900

- William Friday Teacher Education Initiative –
Annual William Friday Teacher Retreat (Carolina K12): \$42,000
- Portraits of Climate Change project (CPH State Outreach): \$19,900

East Carolina University \$10,000

- North Carolina Literary Review: \$10,000

MINUTES

APPENDIX F
NORTH CAROLINIANA SOCIETY –
SOURCES & USES WORKSHEET
JULY 1, 2024 - JUNE 30, 2025 BUDGET

SOURCES:

SOURCES

Donations (general)	\$25,000
Publication and other	200
Annual Distribution from UNC IF	230,000
Withdrawal and use of invested funds	120,000

Adjustments to Additional Sources

UNC IF Distribution to be re-invested: Robert Ragan Fund	(10,000)
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TOTAL SOURCES: Money available for use **\$365,200**

USES:

General/Operating Expenses

Maddison & Caison – audit/review	7,500
Maddison & Caison – Form 990 & 1099s	1,250
Maddison & Caison – bookkeeping/accounting consultation	1,000
The Splinter Group – website	500
Executive Director	53,900
Admin fees	1,000
Engraving	150
Annual Report	8,000
Donation & Legacy Cards	530
Annual Appeal letter	950
Bank Fees	150
Postage & Mailing	400
Post Office Box	230
Supplies	400
Google voice and mail	330
Insurance	1,250
N.C. Sec of State	75
Storage unit	2,280
Board meeting	3,430
Travel	432
Meeting – meals	600

continued

Programs for members

Society Awards – Imprints	13,600
Society Awards – Meetings and Celebrations	23,000

Continued Support

Archie K Davis Fellowships	20,000
North Carolina Collection – Wilson Library (Digital Exhibits)	17,680
North Carolina Collection – Wilson Library (Teaching Fellows)	34,896
N.C. Historical Review	14,000
National History Day	18,000
Teacher Retreats	42,000
Book Award	900
Powell Award	200

Special Programs & Projects

Carolina Public Humanities State Outreach (Portraits of Climate Change)	19,900
North Carolina Collection (Nitrate photographs)	66,667
East Carolina University – NC Literary Review	10,000

TOTAL USES: Expenses for the year **\$365,200**

Minutes of the Forty-Seventh Annual Meeting of the Membership

WEDNESDAY, APRIL 24, 2024
THE CAROLINA INN
CHAPEL HILL, NC

President James W. Clark Jr. called to order the forty-seventh annual membership meeting of the North Caroliniana Society at 4:00 p.m. on Wednesday, April 24, 2024.

The following members were considered to be in attendance, in person or by proxy:

Bobby Allen, Bob Anthony, Alton Ballance, Margaret Bauer, Martin Boney, Henry Bowers, Marjorie B. Buckley, Karl Campbell, Kevin Cherry, Rob Christensen, Jim Clark, Ned Cline, Art Cooper, Alice Cotten, Jerry Cotten, Howard Covington, Jeff Crow, Mary Virginia Currie, Gene Davis, Tom Earnhardt, Jimmy Ervin, Phil Evans, Monika Fleming, Gary Freeze, Emily Gangi, Charlie Gaylor, Rebecca Godwin, Lyons Gray, Borden Hanes, Anna Hayes, Jan Hensley, Maria Henson, Mark Hewitt, Mike Hill, Fred Hobson, Jamie DeMent Holcomb, Myrick Howard, Richard Hunter, Leoneda Inge-Barry, Charles Ingram, George Jackson, Eric D. Johnson, Eric L. Johnson, Todd Johnson, Keith Kapp, Tom Kenan, Susan Kluttz, Lloyd Kramer, Tom Lambeth, William Massey, Leslie McKesson, Eric Medlin, Joe Mobley, Robert Morgan, Perry Morrison, Claudia O'Hale, John Orth, Cheryl Oxford, Richard Paschal, Mack Pearsall, Ron Raxter, Surry Roberts, Terry Roberts, Sally Robinson, Lynn Roundtree, David Routh, Mary Charlotte Safford, Bland Simpson, Arwin Smallwood, Mike Smith, Sherwood Smith, David Stephens, Hugh Stevens, Richard Stevens, Ted Teague, Tom Terrell, Jason Tomberlin, Harry Watson, Emily Weil, Willis Whichard, James Williams, Jo Ann Williford, Rachel Willis, Patrick Wooten, and Maury York.

President Clark noted his President's Report for the Membership was printed on the back side of the Annual Membership Meeting agenda.

On motion of Terry Roberts, seconded by Jeff Crow, the minutes of the Annual Meeting of the Membership, held on Thursday, May 25, 2023, were approved as previously read and circulated.

President Clark announced the recommendation of the Nominating Committee that the following persons be elected to membership in the Society, inviting those present to stand and be recognized:

- Ann Woodford, Andrews
- Maria Henson, Winston-Salem
- Freda Porter, Pembroke
- James Williams, Carrboro
- Eric Medlin, Raleigh
- K. Todd Johnson, Smithfield
- Dan Morrill, Charlotte
- Ken Howard, Raleigh
- David Routh, Chapel Hill
- Robert “Bobby” Allen, Durham
- Mark Hewitt, Pittsboro
- Luther Hodges Jr., Blowing Rock

Upon the motion of the Committee, the new members were unanimously elected to membership in the Society by the members present. President Clark thanked Tom Terrell, chair of the Nominating Committee, and committee members Georgann Eubanks, Kevin Cherry, Ned Cline, and Perry Morrison for their diligent work.

President Clark then called on Kevin Cherry to present the report of the Nominating Committee with respect to the election of directors to serve the Society for the 2024-2025 fiscal year. Kevin Cherry placed into nomination the names of the following to serve as directors: Bland Simpson (President), Alice Cotten (Vice President), Terry Roberts (Vice President), Patrick Wooten (Secretary-Treasurer), Margaret Bauer, David Cecelski, Kevin Cherry, Tom Earnhardt, Georgann Eubanks, Emily Gangi, Rebecca Godwin, Anna Hayes, Eric L. Johnson, Leslie McKesson, Ted Teague, Tom Terrell and Mike Wiley. They were elected unanimously.

There being no further business, President Clark announced the adjournment of the annual meeting of the membership.

Contributions

JULY 1, 2023 – JUNE 30, 2024

General Fund

- Alice & Jerry Cotten, *In Honor of James W. Clark Jr. and Kevin Cherry*
- Anna Hayes
- Arthur W. Cooper
- Arwin & Alisa Smallwood, *In Memory of Gerelene Mayfield*
- B. Perry Morrison Jr.
- Benjamin F. Speller Jr., *In Memory of William Powell and In Honor of Kevin Cherry*
- Bill McCrea, *In Honor of Kevin Cherry*
- Cal Shepard, *In Honor of Kevin Cherry*
- Calvin Hall
- Caroline Fleetwood Stephenson, *In Honor of James W. Clark Jr.*
- Charles P. Gaylor, III
- Cheryl Oxford
- Claudia & Jack O'Hale, *In Honor of James W. Clark Jr.*
- David O. & Mary Stephens, *In Memory of Dr. H.G. Jones*
- Douglas S. Dibbert
- Dr. Chris E. Fonvielle Jr., *In Honor of Lt. Chris E. Fonvielle*
- Dr. Joseph W. Wescott, *In Honor of Ed Wilson*
- Eddie Gouge, *In Honor of Kevin Cherry*
- Elizabeth & Martin W. Borden Family Fund of Triangle Community Foundation, *In Memory of Edwin B. Borden Jr. and In Honor of Dana Borden Lacy*
- Ella Ann L. & Frank B. Holding Foundation
- Emily Williamson Gangi, *In Honor of James W. Clark Jr.*
- Eric Johnson, *In Memory of John L. Sanders*
- Eric L. Johnson
- Fitzpatrick Communications, Inc., *In Honor of Lloyd S. Kramer*
- Frannie Ashburn, *In Honor of Kevin Cherry*
- Fred Hobson, *In Memory of Kimball King and Burke Davis*
- Gary Fenton Barefoot, *In Honor of Dr. Alan Lamm*
- Geo. Watts Carr III, *In Memory of George Watts Hill Sr.*
- George-Anne Willard & Matt Brown, *In Honor of Robert G. Anthony*
- Glenn Jonas
- Harry Watson
- Hillsdale Fund
- James L. Gaddis Jr., *In Honor of Nancy Cobb Lilly*
- James W. Clark Jr., *In Honor of Kevin Cherry*
- Jamie Bosket, *In Honor of Kevin Cherry*

- Jan G. Hensley, *In Honor of Dr. Herbert Schiller*
- Jason Tomberlin, *In Memory of Memory F. Mitchell*
- Jeff Miles, *In Honor of Kevin Cherry*
- Jeffrey J. and Terrell A. Crow, *In Memory of Memory F. Mitchell*
- JoAnn Williford, *In Memory of Elizabeth Fariior Buford*
- John C. Martin, *In Honor of Hon. John B. Lewis Jr.*
- John Haley
- John L. Jernigan, *In Honor of Sherwood H. Smith Jr. and Martin H. Brinkley, and In Memory of James K. Dorsett Jr. and J. Dickson Phillips Jr.*
- John M. Betts, *In Memory of Dr. H.G. Jones*
- John May
- John Victor Orth, *In Memory of Noreen Nolan Orth*
- Joseph Seagle, *In Honor of Kevin Cherry*
- Karen Ipock, *In Honor of James W. Clark Jr.*
- Kathy & Bill White, *In Honor of James W. Clark Jr. and In Memory of Dr. H.G. Jones*
- Kay Massey Weatherspoon
- Kenneth Howard, *In Honor of Kevin Cherry*
- Lana Parrish, *In Honor of Kevin Cherry*
- Lawrence S. Earley, *In Memory of Betty Ray McCain*
- Lee Smith, *In Honor of James W. Clark Jr.*
- Lloyd Kramer, *In Honor of James W. Clark Jr.*
- Lynn Roundtree, *In Honor of James W. Clark Jr.*
- Lyons Gray
- Mack B. Pearsall
- Margaret and David Gardner Donor Advised Fund
- Margaret Bauer, *In Honor of James W. Clark Jr.*
- Margaret Gardner, *In Memory of John Borden McKinnon*
- Mary Charlotte Safford
- Maurice York, *In Honor of Kevin Cherry*
- Michael McFee, *In Honor of Michael R. Hill*
- Monika S. Fleming
- Nancy H. White, *In Honor of Dana Borden Lacy and Bland Simpson*
- Ned Cline
- Norfleet Pruden
- Norwood W. Bryan Jr.
- Peter Hans
- Philip A. Baddour Jr.
- Pickett M. Guthrie, *In Honor of Martha Ruth Kendall Murray*
- Randolph Shaffner
- Rebecca Godwin
- Rev. Tim Mull
- Richard Paschal

continued

CONTRIBUTIONS

- Richard Y. Stevens
- Rob Christensen
- Robert R. Morgan, *In Honor of Evangeline M. Freeman*
- Roger Perry
- Roy W. Johnson, *In Honor of Kevin Cherry*
- Sally Robinson
- Sam J. Ervin IV, *In Honor of Martin Brinkley*
- Sarah Parker, *In Memory of Lucia Peel Powe and Lucia Claire Peel*
- Sherwood H. Smith Jr.
- Surry P. Roberts
- Susan W. Kluttz, *In Honor of Kevin Cherry*
- Susi Hamilton, *In Honor of Kevin Cherry*
- Terry Roberts, *In Honor of James W. Clark Jr.*
- The Curtis Foundation
- Thomas E. Terrell Jr., *In Honor of Kevin Cherry and James W. Clark Jr.*
- Thomas S. Kenan III, *In Honor of Kevin Cherry*
- Thomas W. Earnhardt, *In Honor of James W. Clark Jr.*
- Tom Lambeth, *In Memory of Zachary T. Smith*
- Tony Maupin, *In Memory of Armistead Maupin*
- Warren Bingham
- William D. Johnson
- William Mangum
- William P. Massey, *In Honor of Joe McCall*
- William S. Price Jr., *In Honor of James W. Clark Jr. and Martin Brinkley*
- Willis P. Whichard, *In Honor of Martin H. Brinkley and In Memory of Josephine Ehringhaus Ayers, H. David Bruton, Elizabeth Farrow Buford, Jessie Thomas (Tommy) Bunn, Kelly Edward (Eddie) Greene, Annie Brown Kennedy, Codruta Emese Roberts, Roger W. Smith, Sr., and Rosemary Williams Well Twiford*

Lacy Fund

- Dana Borden Lacy, *In Honor of James W. Clark Jr. and Kevin Cherry*

Powell Fund

- Charles Marshall Ingram, *In Memory of William S. & Virginia W. Powell*

Financial Report

YEAR ENDED JUNE 30, 2024

GENERAL FUND

BEGINNING FUND BALANCE:

Wells Fargo account	\$4,981
UNC Fund cash	34,085
UNC Fund investments	760,646
Balance at June 30, 2023	799,712

INCOME:

Contributions	32,240
Program Income	13,011
Interest and dividends, UNC Fund	115
Realized gain, UNC Fund	35,535
Unrealized gain, UNC Fund	59,830
Total income	140,771

EXPENDITURES:

Other program expenses	47,448
Operating Expenses	61,907
Total expenditures	109,355

ENDING FUND BALANCE:

Wells Fargo account	9,645
UNC Fund cash	1,005
UNC Fund investments	820,478
Balance at June 30, 2024	\$831,128

FINANCIAL REPORT

ARCHIE K. DAVIS FUND

BEGINNING FUND BALANCE:

Wells Fargo account	\$20,000
UNC Fund cash	62,294
UNC Fund investments	1,417,222
Balance at June 30, 2023	1,499,516

INCOME:

Interest and dividends, UNC Fund	169
Realized gain, UNC Fund	66,208
Unrealized gain, UNC Fund	111,480
Total income	177,857

EXPENDITURES:

Archie K. Davis Fellowships	28,000
Carolina Public Humanities – Portraits of Climate Change	19,900
Friday Teacher Education Initiative	6,915
NC Historical Review	7,479
Total expenditures	62,294

ENDING FUND BALANCE:

Wells Fargo account	86,208
UNC Fund cash	169
UNC Fund investments	1,528,702
Balance at June 30, 2024	\$1,615,079

H.G. JONES FUND**BEGINNING FUND BALANCE:**

UNC Fund cash	\$16,401
UNC Fund investments	375,961
Balance at June 30, 2023	392,362

INCOME:

Interest and dividends, UNC Fund	77
Realized gain, UNC Fund	17,564
Unrealized gain, UNC Fund	29,574
Total income	47,215

EXPENDITURES:

North Carolina Collection	15,000
Friday Teacher Education Initiative	1,524
Total expenditures	16,524

ENDING FUND BALANCE:

Wells Fargo account	17,442
UNC Fund cash	77
UNC Fund investments	405,534
Balance at June 30, 2024	\$423,053

H.G. JONES RESTRICTED FUND**BEGINNING FUND BALANCE:**

UNC Fund cash	\$40,652
UNC Fund investments	922,060
Balance at June 30, 2023	962,712

INCOME:

Interest and dividends, UNC Fund	188
Realized gain, UNC Fund	43,076
Unrealized gain, UNC Fund	72,531
Total income	115,795

EXPENDITURES:

Friday Teacher Education Initiative	9,571
Other program expenses	30,959
Total expenditures	40,530

ENDING FUND BALANCE:

Wells Fargo account	43,198
UNC Fund cash	188
UNC Fund investments	994,590
Balance at June 30, 2024	\$1,037,977

FINANCIAL REPORT

WILLIAM S. POWELL FUND

BEGINNING FUND BALANCE:

UNC Fund cash	\$8,185
UNC Fund investments	186,229
Balance at June 30, 2023	194,414

INCOME:

Contributions	100
Interest and dividends, UNC Fund	38
Realized gain, UNC Fund	8,700
Unrealized gain, UNC Fund	14,649
Total income	23,487

EXPENDITURES:

Powell Award	259
Friday Teacher Education Initiative	8,026
Total expenditures	8,285

ENDING FUND BALANCE:

Wells Fargo account	8,700
UNC Fund cash	38
UNC Fund investments	200,878
Balance at June 30, 2024	\$209,616

ROBERT ALLISON RAGAN FUND

BEGINNING FUND BALANCE:

UNC Fund cash	\$8,937
UNC Fund investments	207,490
Balance at June 30, 2023	216,427

INCOME:

Interest and dividends, UNC Fund	73
Realized gain, UNC Fund	9,967
Unrealized gain, UNC Fund	17,004
Total income	27,044

ENDING FUND BALANCE:

UNC Fund cash	10,040
UNC Fund investments	233,431
Balance at June 30, 2024	\$243,471

ALICE AND JERRY COTTEN FUND

BEGINNING FUND BALANCE:

UNC Fund cash	\$4,378
UNC Fund investments	99,613
Balance at June 30, 2023	103,991

INCOME:

Interest and dividends, UNC Fund	18
Realized gain, UNC Fund	4,654
Unrealized gain, UNC Fund	7,836
Total income	12,508

EXPENDITURES:

Friday Teacher Education Initiative	4,378
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ENDING FUND BALANCE:

Wells Fargo Account	4,654
UNC Fund Cash	18
UNC Fund investments	107,449
Balance at June 30, 2024	\$112,121

CASHION-STEELMAN FUND

BEGINNING FUND BALANCE:

UNC Fund cash	\$12,521
UNC Fund investments	284,895
Balance at June 30, 2023	297,416

INCOME:

Interest and dividends, UNC Fund	58
Realized gain, UNC Fund	13,309
Unrealized gain, UNC Fund	22,410
Total income	35,777

EXPENDITURES:

N.C. Historical Review	12,521
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ENDING FUND BALANCE:

Wells Fargo account	13,309
UNC Fund cash	58
UNC Fund investments	307,305
Balance at June 30, 2024	\$320,672

FINANCIAL REPORT

NC SOCIETY BOOK FUND

BEGINNING FUND BALANCE:

UNC Fund cash	\$3,621
UNC Fund investments	82,383
Balance at June 30, 2023	86,004

INCOME:

Interest and dividends, UNC Fund	15
Realized gain, UNC Fund	3,849
Unrealized gain, UNC Fund	6,480
Total income	10,344

EXPENDITURES:

Friday Teacher Education Initiative	2,802
Book Award Committee expenses	819
Total expenditures	3,621

ENDING FUND BALANCE:

Wells Fargo account	3,849
UNC Fund cash	15
UNC Fund investments	88,863
Balance at June 30, 2024	\$92,727

W. TRENT RAGLAND JR. FUND

BEGINNING FUND BALANCE:

UNC Fund cash	\$23,652
UNC Fund investments	538,147
Balance at June 30, 2023	561,799

INCOME:

Interest and dividends, UNC Fund	110
Realized gain, UNC Fund	25,140
Unrealized gain, UNC Fund	42,331
Total income	67,581

EXPENDITURES:

North Carolina Collection	23,652
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ENDING FUND BALANCE:

Wells Fargo account	25,140
UNC Fund cash	110
UNC Fund investments	580,478
Balance at June 30, 2024	\$605,728

DANA BORDEN LACY FUND

BEGINNING FUND BALANCE:

UNC Fund cash	\$7,514
UNC Fund investments	170,973
Balance at June 30, 2023	178,487

INCOME:

Contributions	200
Interest and dividends, UNC Fund	35
Realized gain, UNC Fund	7,987
Unrealized gain, UNC Fund	13,449
Total income	21,671

EXPENDITURES:

North Carolina Collection	7,514
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ENDING FUND BALANCE:

Wells Fargo account	8,187
UNC Fund cash	35
UNC Fund investments	184,422
Balance at June 30, 2024	\$192,644

WILLIAM C. FRIDAY FUND

BEGINNING FUND BALANCE:

UNC Fund cash	6,784
UNC Fund investments	154,361
Balance at June 30, 2023	161,145

INCOME:

Interest and dividends, UNC Fund	31
Realized gain, UNC Fund	7,211
Unrealized gain UNC Fund	12,142
Total income	19,385

EXPENDITURES:

Friday Teacher Education Initiative	6,784
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ENDING FUND BALANCE:

Wells Fargo account	7,211
UNC Fund cash	31
UNC Fund investments	166,504
Balance at June 30, 2024	\$173,746

FINANCIAL REPORT

VALUE OF BANK CASH ACCOUNTS

June 30, 2024

General Fund	\$9,645
Archie K. Davis Fund	86,208
H.G. Jones Fund	17,442
H.G. Jones Restricted Fund	43,198
William S. Powell Fund	8,700
Robert A. Ragan Fund	7,211
Alice and Jerry Cotten Fund	4,654
Cashion-Steelmann Fund	13,309
NC Society Book Fund	3,849
W. Trent Ragland Jr. Fund	25,140
Dana B. Lacy Fund	8,187
William C. Friday Fund	7,211
Total Bank Cash Accounts	\$227,543

VALUE OF UNC INVESTMENT FUND CASH ACCOUNTS

June 30, 2024

General Fund	\$1,005
Archie K. Davis Fund	169
H.G. Jones Fund	77
H.G. Jones Restricted Fund	188
William S. Powell Fund	38
Robert A. Ragan Fund	10,040
Alice and Jerry Cotten Fund	18
Cashion-Steelmann Fund	58
NC Society Book Fund	15
W. Trent Ragland Jr. Fund	110
Dana B. Lacy Fund	35
William C. Friday Fund	31
Total UNC Investment Fund Cash Accounts	\$11,784

VALUE OF UNC INVESTMENT FUND INVESTMENTS

June 30, 2024

General Fund	\$820,478
Archie K. Davis Fund	1,528,702
H.G. Jones Fund	405,534
H.G. Jones Restricted Fund	994,590
William S. Powell Fund	200,878
Robert A. Ragan Fund	233,431
Alice and Jerry Cotten Fund	107,449
Cashion-Steelmann Fund	307,305
NC Society Book Fund	88,863
W. Trent Ragland Jr. Fund	580,478
Dana B. Lacy Fund	184,422
William C. Friday Fund	166,504
Total UNC Investment Fund Investments	\$5,618,634

Members of The North Caroliniana Society

JUNE 30, 2024

Legend: ****Founder/Incorporator ***Founding Member

**Charter Member *Honorary Life Member

A Member whose name appears in this italic typeface is or was a Legacy Member, having included the North Caroliniana Society in his or her estate plan.

- Shelia K. Adams, P.O. Box 1866, Mars Hill 28754-1866
- Stuart A. Albright Jr., 2704 Bexley Avenue, Durham 27707-3921
- Robert C. Allen, 2526 Lanier Place, Durham 27705
- Karen W. Amspacher, P.O. Box 2, Marshallberg 28553
- Jean Bradley Anderson, 2701 Pickett Road #4044, Durham 27705
- Leslie Anderson, 10 Blackwood Road, Asheville 28804
- Robert G. Anthony Jr., 207 Columbia Place West, Chapel Hill 27516-2160
- James Applewhite
- Philip A. Baddour Jr., P.O. Box 916, Goldsboro, 27533
- J. Todd Bailey, P.O. Box 217, Burnsville 28714
- Mary Layne Baker, 1005 Queensbury Circle, Durham 27713
- Alton Ballance, P.O. Box 510, Ocracoke 27960
- Daniel W. Barefoot, 709 South Aspen Street, Lincolnton 28092
- *Gary Fenton Barefoot, 304 N. Southerland Street, Mount Olive 28365/Legacy*
- Margaret D. Bauer, English Department, ECU, Greenville 27858-4353
- Jack Betts, 3292 Belcher Mtn Road, Meadows of Dan, VA 24120
- Catherine W. Bishir, 126 Wee Loch Drive, Cary 27511
- Philip Blumenthal, 2040 Vernon Drive, Charlotte 28211
- Martin Boney, 2736 Lakeview Drive, Raleigh 27609
- Martin Williamson Borden, 3304 Landor Road, Raleigh 27609
- Henry Bowers, 101 Wee Loch Drive, Cary 27511
- Erskine Bowles, 6725 Olde Providence Road, Charlotte 28226
- Martin H. Brinkley, 2900 Fairview Road, Raleigh 27608
- George-Anne Willard Brown, 118 Grifford Drive, Louisburg 27549-2204
- Norwood Bryan, 505 Valley Road, Fayetteville 28305
- *Marjorie B. Buckley, 11450 Turtle Beach Road, North Palm Beach, FL 33408/Legacy*
- Hon. Frank W. Bullock Jr., 1918 Lafayette Avenue, Greensboro 27408
- Timothy B. Burnett, 810 Country Club Drive, Greensboro 27408
- Mary Louise Burress, Two Graylyn Place, Winston-Salem 27106
- John Buxton, 32 Beverly Drive, Durham 27707

continued

MEMBERSHIP

- Cameron Smith Callaway, 2719 St. Mary's Street, Raleigh 27609
- Karl E. Campbell, 3305 Land Harbor, Newland 28657
- Geo. Watts Carr III, 4215 Trillium Lane, Greensboro 27410
- Wiley Cash, 2204 Camelia Drive, Wilmington 28403-2416
- David S. Cecelski, 1502 Bivins Street, Durham 27707
- Kevin Cherry, 124 East Second Street, Washington 27889
- Rob Christensen, 204 Erskine Court, Cary 27511
- Jack E. Claiborne, 2305 East Fifth Street, Charlotte 28204**
- Annette Saunooke Clapsaddle, P.O. Box 1061, Whittier 28789
- James W. Clark Jr., 809 Gardner Street, Raleigh 27607
- Ned Cline, 2601 Passavant Court, Burlington 27215
- Arthur W. Cooper, 130 Wee Loch Drive, Cary 27511
- Alice R. Cotten, 1300 Arboretum Drive, Chapel Hill 27517
- Jerry W. Cotten, 1300 Arboretum Drive, Chapel Hill 27517
- Howard E. Covington Jr., 218 East Avondale Drive, Greensboro 27403
- Jeffrey J. Crow, 100 Vashon Court, Cary, 27513
- Mary Virginia Spruill Currie, 7539 Piney Branch Road, Richmond, VA 23225
- Donald W. Curtis, 622 Lakestone Drive, Raleigh 27609
- Julia Jones Daniels, P.O. Box 671, Raleigh 27602
- Jan Davidson, P.O. Box 157, Brasstown 28902
- Archie H. Davis, 107 John Wesley Way, Savannah, GA 31404
- Gene Davis, 4012 City of Oaks Wynd, Raleigh 27612-5309
- Angela Davis-Gardner, 2608 Wells Avenue, Raleigh 27608
- Seth Dearmin, 700 E. Franklin Street, Raleigh 27604
- Jan DeBlieu, 55 Wallentine Road, Bowdoinham, ME 04008-0220
- Douglas S. Dibbert, 8 Lanier Drive, Chapel Hill 27517
- Samuel Bobbitt Dixon, 114 West King Street, Edenton 27932
- James Dodson, 3506 Dogwood Drive, Greensboro 27403
- Laurelyn Dossett, 2741 Lynchburg Road, Westfield 27053
- Allyson K. Duncan, 3908 City of Oaks Wynd, Raleigh 27612
- Lawrence S. Earley, 126 Forest Drive, Raleigh 27605
- Thomas W. Earnhardt, 834 Fearington Post, Pittsboro 27312-5022
- Clyde C. Edgerton, 437 Wayne Drive, Wilmington 28403
- Mary Best Ellington, 6B Buckboard Lane, Greensboro 27410
- Sam J. Ervin, IV, 517 Lenoir Street, Morganton 28655
- Georgann Eubanks, 105 Jones Ferry Road, Unit T, Carrboro 27510
- Phillip W. Evans, 1501 Cole Mill, Durham 27705
- Joseph S. Ferrell, 426 Legend Oaks Drive, Chapel Hill 27517
- Keebe Fitch, 2000 Fearington Village, Pittsboro 27312
- Joyce L. Fitzpatrick, 224 Woodburn Road, Raleigh 27605
- Monika S. Fleming, 1665 Burnette Farm Road, Tarboro 27886
- John Baxton Flowers III, 108 Muirfield Court, Hendersonville 28791***
- Chris Eugene Fonvielle Jr., P.O. Box 796, Wrightsville Beach 28480
- Charles Frazier
- Gary R. Freeze, 725 N. Craige Street, Salisbury 28144

- Shirley T. Frye, 1401 S. Benbow Road, Greensboro 27406
- James L. Gaddis Jr., 107 Woodberry Drive, Greenville 27858
- Emily Williamson Gangi, 5505 Weston Downs Drive, Durham 27707
- Margaret Gardner, 3220 Nebraska Avenue, NW, Washington, DC 20016
- Charles P. Gaylor III, 310 West Walnut Street, Goldsboro 27530
- Marianne Buie Gingham, 301 E. Hendrix Street, Greensboro 27401
- Rebecca Godwin, 2119 Dayton Drive, Wilson 27893
- James F. Goodmon, 719 Lakestone Drive, Raleigh 27609
- Lyons Gray, 712 Aldersgate Drive, Unit 101, Winston-Salem 27104-1185
- Jaki Shelton Green, 226 South Eleventh Street, Mebane 27302
- Pickett Murray Guthrie, 535 Carolina Meadows, Chapel Hill 27517
- Robyn Hadley, P.O. Box 905, Graham 27523
- John H. Haley, 8429 Fazio Drive, Wilmington 28411
- Calvin L. Hall, 1017 Bengel Drive, Durham 27703
- F. Borden Hanes Jr., 2870 Bartram Road, Winston-Salem 27106
- Peter Hans, UNC System, 400 E. Franklin Street, Chapel Hill 27514
- Thomas J. Harrelson, 202 West Bay Street, Southport 28461
- Anna R. Hayes, 515 Senlac Road, Chapel Hill 27514
- Jan G. Hensley, 6100 West Friendly Ave. #3312, Greensboro 27410
- Glenda Maria Henson, 414 Horace Mann Avenue, Winston-Salem 27104
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- J. Myrick Howard, 206 Woodburn Road, Raleigh 27605
- Kenneth B. Howard, 517 Hertford Street, Raleigh 27609
- Elizabeth Hudson, 5 Haverford Point, Greensboro 27455
- James B. Hunt Jr., 6653D Gov. Hunt Road, Lucama 27851
- Richard E. Hunter Jr., 210 Plummer Street, Warrenton 27589
- Leoneda Inge-Barry, 603 Gray Avenue, Durham 27701
- Charles Marshall Ingram, 210 Seminary St., P.O. Box 10, Kenansville 28349-0010
- George Jackson, 1523 Rivershore Road, Elizabeth City 27909-6201
- Herb Jackson, P. O. Box 10, Davidson 28036
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- K. Todd Johnson, 415 E. Davis Street, Smithfield 27577
- Roy W. Johnson, 3741 Larkston Drive, Charlotte 28226

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- Leslie Dula McKesson, 202 La Foret, Morganton 28655
- Sallie A. McMillion, 4100 Well Spring Drive Unit 2314, Greensboro 27410-8837
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- Robert R. Morgan, 1608 Hanshaw Road, Ithaca, NY 14850
- Dan L. Morrill, 139 Middleton Drive, Charlotte 28207
- B. Perry Morrison Jr., 2113 Chelsea Drive, Wilson 27896
- Crae Morton, P.O. Box 2388, Boone 28607-2388
- Jason Mott, 485 Loop Road, Bolton 28423

- Percy E. Murray, 33 Churchwell Court, Durham 27713
- Florence T. Nash, 1500 Alabama Avenue, Durham 27705
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- Douglas M. Orr, 231 Valley Ridge Lane, Black Mountain 28711
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- Ben Owen III, 110 Ben's Place, Seagrove 27341
- Cheryl Oxford, 3538 Crestwood Drive, Morganton 28655
- Freddie L. Parker, 260 Solstice Drive, Haw River 27258
- Karen Parker, 273 Kendall Farms Court, Winston-Salem 27107
- Michael Parker, 2512 Green Street, Durham 27705-4038
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- John Ward Purrington, 2723 Riddick Drive, Raleigh 27609
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- Lynn Roundtree, P. O. Box 1145, Chapel Hill 27514
- David Routh, 205 N. Boundary Street, Chapel Hill 27514
- Mary Charlotte Safford, 426 Bost Road, Morganton 28655
- Randolph Preston Shaffner, 125 Spring View Drive, Black Mountain 28711
- Linda Simmons-Henry, 225 Elverson Place, Cary 27519
- Bland Simpson, 3100 Morrow Farm Lane, Chapel Hill 27516

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- Michael Smith, 1711 Michaux Road, Chapel Hill 27514
- Sherwood H. Smith Jr., 408 Drummond Drive, Raleigh 27609
- Wade M. Smith, 2613 Wilson Lane, Raleigh 27609
- Aaron L. Spaulding, 116 Legacy Lane, Durham 27713-9019
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- Richard D. Starnes, WCU Office of the Provost, Cullowhee 28723
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- Thomas E. Terrell Jr., 529 W. Parkway Avenue, High Point 27262
- Beverly Tetterton-Opheim, 107 Galloway Court, Raleigh 27615
- Roberts Edgar “Bob” Timberlake, 621 Rosewood Drive, Lexington 27292
- Patricia Timmons-Goodson, 1801 Lakeshore Drive, Fayetteville 28305
- Larry Edward Tise, 705 Corinthian Avenue, Philadelphia, PA 19130
- Jason E. Tomberlin, 104 Kettlewell Court, Cary 27519
- Garland S. Tucker III, 2327 Lake Drive, Raleigh 27609
- Charlotte Vestal Wainwright, 3550 Horton Street, Waltonwood Lake Boone, Raleigh 27607
- Marsha Warren, 20090 Fountain, Chapel Hill 27517
- Darin J. Waters, 2807 Corbett Grove Drive, Raleigh 27616
- Alan D. Watson, 258 Windchime Drive, Wilmington 28412
- Harry L. Watson, 107 Buck Taylor Trail, Chapel Hill 27516
- Kay Massey Weatherspoon, 8919 Park Road #265, Charlotte 28210
- Emily N. Weil, 100 Pineridge Lane, Goldsboro 27534
- Joseph W. Wescott II, 676 Wescott Road SE, Bolivia 28422
- D. Jordan Whichard III, 811 Bremerton Drive, Greenville 27858/*Legacy*
- *Willis P. Whichard, 344 Cedar Club Circle, Chapel Hill 27517**/Legacy*
- William A. Whitaker, 2498 Montview Drive, N.W., Atlanta, GA 30305
- Nancy Hanes White, 13012 Melvin Arnold Road, Raleigh 27613
- Kathy White, 906 E. 7th Street, Roanoke Rapids 27870**
- Mike Wiley, 238 Bellemont Road, Pittsboro 27312
- James E. Williams Jr., 415 Waterside Drive, Carrboro 27510
- Mary D. Williams, 700 Springview Trail, Garner 27529
- Max R. Williams, 1880 Brookwood Avenue #515, Burlington 27215-3206
- Richard ‘Stick’ Williams, 14114 Timbergreen Drive, Huntersville 28078
- JoAnn Williford, 1628 Lorraine Road, Raleigh 27607
- Rachel A. Willis, 112 Cedar Pond Lane, Chapel Hill 27517
- John B. Wilson Jr., 305 Madera Lane, Chapel Hill 27517

- Ann Miller Woodford, P.O. Box 1766, Andrews 28901
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- Jonathan Yardley, 1500 Vermont Avenue #1, NW, Washington, DC 20005
- Maurice C. York, 2001 East Fifth Street, Greenville 27858
- David A. Zucchini, 4594 Carlton Crossing Drive, Durham 27713

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- Millie M. Barbee, Hickory
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- John B. "Jack" Lewis Jr., Raleigh
- Todd L. Miller, Newport
- Edward Pleasants, Winston-Salem
- Dudley Hill Sargent, Durham
- Emily Herring Wilson, Winston-Salem

DECEASED MEMBERS

- R. Mayne Albright (d. 1994)
- Jean Denny Ashley (d.2019)**
- William B. Aycock (d. 2015)
- Jane C. Bahnsen (d. 2001)**
- Bessie Bangert Ballentine (d. 1991)***
- Holley Mack Bell (d. 2008)
- Norma Berryhill (d. 2005)
- W. Reece Berryhill (d. 1979)**
- Doris Betts (d. 2012)**
- Leonidas Betts (d. 2003)**
- John Fries Blair (d. 1986)**
- LeGette Blythe (d. 1993)**
- William B. Blythe (d. 2001)
- *Susan Taylor Block* (d. 2022)/Legacy
- Leslie N. Boney Jr. (d. 2003)
- Sion A. Boney (d. 2010)
- Edwin B. Borden (d. 2022)
- Herbert C. Bradshaw (d. 1976)**
- James S. Brawley (d. 1981)**
- David Brinkley (d. 2003)**
- D. Clifton Brock Jr. (d. 2006)**
- Thornton H. Brooks (d. 1988)
- H. David Bruton (d. 2023)
- Sally B. Buckner (d. 2018)
- Elizabeth Farrior Buford (d. 2023)
- *Margaret Burgwyn* (d. 2021)/Legacy
- Lindley S. Butler (d.2022)
- James R. Caldwell Jr. (d. 1994)
- Creighton Lee Calhoun (d. 2020)
- Orville B. Campbell (d. 1989)**
- Gertrude S. Carraway (d. 1993)***
- G. Paul Carr (d. 2024)
- *Jerry C. Cashion* (d. 2015)/Legacy
- George H. V. Cecil (d. 2020)**
- Fred Chappell (d. 2024)
- Joseph B. Cheshire Jr. (d. 2006)
- John T. Church (d. 1999)**
- David Clark (d. 1997)**
- James McClure Clarke (d. 1999)**
- Russell T. Clay (d. 2002)
- Albert Coates (d. 1989)***
- Gladys Hall Coates (d. 2002)
- William M. Cochrane (d. 2004)*/**
- Marie Watters Colton (d. 2018)
- H. G. Connor (d. 1989)
- Louis M. Connor Jr. (d. 1992)****/*
- J. Isaac Copeland (d. 1995)**
- Jane Corey (d. 1997)
- Archibald Craige (d. 2000)**
- William P. Cumming (d. 1989)
- Claude Currie (d. 1978)**
- James S. Currie (d. 1991)**
- Archie K. Davis (d. 1998)***/*
- James E. Davis (d. 1997)
- J. Haywood Davis (d. 2024)
- Harriet Doar (d. 1999)
- Virginia Pou Doughton (d. 2014)
- Wilma Dykeman (d. 2006)**
- Charles Edward Eaton (d. 2006)
- Thomas S. Edwards (d. 2021)
- John Ehle (d. 2018)**
- Mrs. Alfred G. Engstrom (d. 1997)**
- Eunice Worth Ervin (d. 1988)**

continued

MEMBERSHIP

- Sam J. Ervin Jr. (d. 1985)**
- Helen Wolfe Evans (d. 2009)
- June Ficklen (d. 2017)
- Ben Fountain (d. 2016)
- Lila Ponder Friday (d. 2024)
- William C. Friday (d. 2012)***
- Christopher C. Fordham III (d. 2008)
- Henry A. Foscue (d. 1985)**
- John Hope Franklin (d. 2009)
- T. Harry Gatton (d. 2001)**
- Raymond Gavins (d. 2016)
- Philip Gerard (d. 2022)
- Edwin M. Gill (d. 1978)**
- L. R. Gorrell (d. 2010)
- Harry Golden (d. 1981)**
- James F. Govan (d. 2004)***
- Paul Green (d. 1981)***
- Gordon H. Greenwood (d. 1997)**
- Wade H. Hadley Jr. (d. 2002)
- Peter W. Hairston (d. 2007)**
- Louise McG. Hall (d. 2008)**
- *Frank Borden Hanes Sr.*
(d. 2013)**/*Legacy*
- John W. Harden (d. 1985)**
- Paul Hardin (d. 2017)
- Margaret Taylor Harper (d. 2009)**
- John Douglas Helms (d. 2018)
- W. Dallas Herring (d. 2007)
- Joe A. Hewitt (d. 2018)
- George Watts Hill (d. 1993)***
- Betty A. Hodges (d. 2009)**
- Sara W. Hodgkins (d. 1992)
- Michael Hooker (d. 1999)
- Doris Goerch Horton (d. 1984)***
- Hamilton C. Horton Jr. (d. 2006)**
- James E. Holshouser Jr. (d. 2013)
- John L. Humber (d. 2017)
- Betty Debnam Hunt (d. 2020)
- James F. Hurley (d. 2012)
- Elizabeth Stevenson Ives (d. 1994)
- Blyden Jackson** (d. 2000)
- Harley E. Jolley (d. 2020)
- Betty C. Jolley (d. 2007)
- W.A. Johnson (d. 2013) **
- Ben M. Jones III (2016)
- *H. G. Jones (d. 2018)****/Legacy*
- John R. Jordan Jr. (d. 2016)**
- Mary Coker Joslin (d. 2016)
- Frank H. Kenan (d. 1996)**
- Randall Kenan (d. 2020)
- Charles Kuralt (d. 1997)**
- Thomas J. Lassiter (d. 2000)**
- Hugh T. Lefler (d. 1981)**
- Sarah M. Lemmon (d. 2002)**
- Henry W. Lewis (d. 2004)**
- George Elliot London (d. 1993)**
- Lawrence F. London (d. 2005)
- Henry Jay MacMillan (d. 1992)**
- Harry C. Martin (d. 2015)
- John C. Martin (d. 2024)
- Margaret Maron (d. 2021)
- Betty Ray McCain (d. 2022)
- Henry A. McKinnon Jr. (d. 2011)
- Holt McPherson, (d. 1979)**
- Robert H. Mason (d. 2001)
- Armistead Jones Maupin (d. 2005)**
- Fairfax Polk Mitchell (d. 1999)
- Memory F. Mitchell (d. 2023)
- Neil Morgan (d. 2014)**
- Elizabeth Vann Moore (d. 2009)**
- Mrs. Dan K. Moore (d. 1999)***
- Robert B. Morgan (d. 2016)**
- Naomi E. Morris (d. 1986)***
- Emma Neal McQueen Morrison
(d. 2008)**
- Hugh MacRae Morton (d. 2006)
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- Jaquelin Drane Nash (d. 2004)
- *Charles S. Norwood Sr.*
(d. 1989)/*Legacy*
- *Charles S. Norwood Jr.*
(d. 2020)/*Legacy*
- Oliver H. Orr Jr. (d. 2018)
- Guy Owen (d. 1981)**
- Frank M. Parker (d. 1995)**
- Roy Parker Jr. (d. 2013)**
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- Virginia Powell (d. 2022)
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- Norris W. Preyer (d. 2013)
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- R. Beverly R. Webb (d. 2012)
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- Mena F. Webb (d. 2012)**
- Manly Wade Wellman (d. 1986)**
- Tom Wicker (d. 2011) **
- Roy Wilder Jr. (d. 2012)**
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- Louis Round Wilson (d. 1979)*
- Penelope Wilson (d. 2004)**
- John Gilliam Wood (d. 2015)
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Georgann Eubanks, Willis P. Whichard, Alice R. Cotten
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THIRD ROW: Thomas E. Terrell Jr., Jeffrey J. Crow, James W. Clark Jr., Kevin Cherry, Lloyd Kramer
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North Caroliniana Society Award Recipients

- | | |
|--|--|
| 1978 — Paul Green | 2002 — Frank Borden Hanes Sr. |
| 1979 — Albert Coates | 2003 — Maxine Swalin |
| 1980 — Sam J. Ervin Jr. | 2004 — Elizabeth Vann Moore |
| 1981 — Sam Ragan | 2004 — W. Trent Ragland Jr. |
| 1982 — Gertrude Sprague Carraway | 2005 — W. Dallas Herring |
| 1983 — John Fries Blair | 2005 — John Hope Franklin |
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| 1985 — William S. Powell | 2006 — Joseph F. Steelman |
| 1986 — Mary D.B.T. &
James H. Semans | 2007 — William B. Aycock |
| 1987 — David Stick | 2007 — Fred Chappell |
| 1988 — William McWhorter Cochrane | 2008 — Henry E. & Shirley T. Frye |
| 1989 — Emma Neal Morrison | 2008 — Robert & Jessie Rae Scott |
| 1990 — Burke Davis | 2009 — James E. Holshouser Jr. |
| 1991 — Lawrence F. London | 2010 — Bland Simpson |
| 1992 — Frank Hawkins Kenan | 2011 — Lindsay C. Warren Jr. |
| 1993 — Charles Kuralt | 2012 — Lee Smith |
| 1994 — H.G. Jones | 2013 — Thomas W. Lambeth |
| 1994 — Archie K. Davis | 2014 — Myrick Howard |
| 1994 — North Carolina Collection | 2015 — Herb Jackson |
| 1995 — J. Carlyle Sitterson | 2016 — Willis P. Whichard |
| 1995 — LeRoy T. Walker | 2017 — H. David Bruton |
| 1996 — Hugh MacRae Morton | 2018 — Catherine Ward Bishir |
| 1997 — John L. Sanders | 2019 — Alice & Jerry Cotten |
| 1998 — Doris Waugh Betts | 2020 — D.G. Martin |
| 1999 — Reynolds Price | 2021 — Howard N. Lee |
| 2000 — Richard H. Jenrette | 2022 — William Mangum |
| 2001 — Wilma Dykeman | 2023 — Martin Brinkley |
| | 2024 — Kevin Cherry |

North Caroliniana Society Book Award Recipients

- 2003** — Catherine W. Bishir and Michael T. Southern for *A Guide to the Historic Architecture of Piedmont North Carolina* (University of North Carolina Press, 2003).
- 2004** — Timothy B. Tyson for *Blood Done Sign My Name: A True Story* (Crown Publishers, 2004).
- 2005** — Joe Mobley for *“War Governor of the South”: North Carolina’s Zeb Vance in the Confederacy* (University Press of Florida, 2005).
- 2006** — William S. Powell for *Encyclopedia of North Carolina* (University of North Carolina Press, 2006).
- 2007** — Karl E. Campbell for *Senator Sam: Last of the Founding Fathers* (University of North Carolina Press, 2007).
- 2008** — Anna Ragland Hayes for *Without Precedent: The Life of Susie Marshall Sharp* (University of North Carolina Press, 2008).
- 2009** — Mark L. Bradley for *Bluecoats and Tar Heels: Soldiers and Civilians in Reconstruction North Carolina* (Lexington: University Press of Kentucky, 2009).
- 2010** — Robert R. Korstad and James L. Leloudis for *To Right These Wrongs: The North Carolina Fund and the Battle to End Poverty and Inequality in 1960s America* (Chapel Hill: University of North Carolina Press, 2010).
- 2011** — David Silkenat for *Moments of Despair: Suicide, Divorce, & Debt in Civil War Era North Carolina* (Chapel Hill: University of North Carolina Press, 2011).
- 2012** — David S. Cecelski for *The Fire of Freedom: Abraham Galloway & the Slaves’ Civil War* (Chapel Hill: University of North Carolina Press, 2012).
- 2013** — Sarah Caroline Thuesen for *Greater than Equal: African American Struggles for Schools and Citizenship in North Carolina, 1919-1965* (Chapel Hill: University of North Carolina Press, 2013).
- 2014** — Jeffrey Reaser and Walt Wolfram for *Talkin’ Tar Heel: How Our Voices Tell the Story of North Carolina* (Chapel Hill: University of North Carolina Press, 2014).
- 2015** — Jessica Bandel, Michael Hill, and Mark Anderson Moore for *The Old North State at War: The North Carolina Civil War Atlas* (Raleigh: North Carolina Department of Natural and Cultural Resources, 2015).
- 2016** — David Silkenat for *Driven From Home: North Carolina’s Civil War Refugee Crisis* (Athens: University of Georgia Press, 2016).

2017 — Larry E. Tise and Jeffrey J. Crow for *New Voyages to Carolina: Reinterpreting North Carolina History* (Chapel Hill: University of North Carolina Press, 2017)

2018 — Ansley Herring Wegner and Jeff Miles for *This Day In North Carolina* designed by Sheilah Barrett Carroll (Raleigh: North Carolina Department of Natural and Cultural Resources, 2018)

2019 — Howard Covington for *Fire and Stone: The Making of The University of North Carolina under Presidents Edward Kidder Graham and Harry Woodburn Chase* (Chapel Hill: University of North Carolina at Chapel Hill Library, 2019)

2020 — David Menconi for *Step It Up & Go: The Story of North Carolina*

Popular Music, from Blind Boy Fuller and Doc Watson to Nina Simone and Superchunk (Chapel Hill: University of North Carolina Press, 2020)

2021 — Bland Simpson for *North Carolina: Land of Water, Land of Sky* (Chapel Hill: University of North Carolina Press, 2021)

2022 — Lindley S. Butler for *A History of North Carolina in the Proprietary Era, 1629-1729* (Chapel Hill: University of North Carolina Press, 2022)

2023 — Drew A. Swanson for *A Man of Bad Reputation: The Murder of John Stephens and the Contested Landscape of North Carolina Reconstruction* (Chapel Hill: University of North Carolina Press, 2023)

North Caroliniana Society William Stevens Powell Award Recipients

2002 — Eric David Johnson

2004 — Jonathan Slain

2008 — Eve Marie Carson

2011 — Frank O'Hale

2015 — Isaac Warshauer

2018 — Morgan Vickers

2019 — Jordan Kathryn Jenkins

2022 — Abby Wooten

2023 — Seth Thomas Moore

2024 — Robert Elliot Clay

North Caroliniana Society Imprints Numbers 1-65 (1978-2024)

- No. 1.** *An Evening at Monticello: An Essay in Reflection* (1978) by Edwin M. Gill
- No. 2.** *The Paul Green I Know* (1978) by Elizabeth Lay Green
- No. 3.** *The Albert Coates I Know* (1979) by Gladys Hall Coates
- No. 4.** *The Sam Ervin I Know* (1980) by Jean Conyers Ervin
- No. 5.** *Sam Ragan* (1981) by Neil Morgan
- No. 6.** *Thomas Wolfe of North Carolina* (1982) edited by H.G. Jones
- No. 7.** *Gertrude Sprague Carraway* (1982) by Sam Ragan
- No. 8.** *John Fries Blair* (1983) by Margaret Blair McCuiston
- No. 9.** *William Clyde Friday and Ida Howell Friday* (1984)
by Georgia Carroll Kyser and William Brantley Aycok
- No. 10.** *William S. Powell, Historian* (1985) by David Stick and William C. Friday
- No. 11.** *"Gallantry Unsurpassed"* (1985) edited by Archie K. Davis
- No. 12.** *Mary and Jim Semans, North Carolinians* (1986) by W. Kenneth Goodson
- No. 13.** *The High Water Mark* (1986) edited by Archie K. Davis
- No. 14.** *Raleigh and Quinn: The Explorer and His Boswell* (1987)
edited by H.G. Jones
- No. 15.** *A Half Century in Coastal History* (1987) by David Stick
- No. 16.** *Thomas Wolfe at Eighty-seven* (1988) edited by H.G. Jones
- No. 17.** *A Third of a Century in Senate Cloakrooms* (1988)
by William McWhorter Cochrane
- No. 18.** *The Emma Neal Morrison I Know* (1989) by Ida Howell Friday
- No. 19.** *Thomas Wolfe's Composition Books* (1990) edited by Alice R. Cotten

- No. 20.** *My Father*, Burke Davis (1990) by Angela Davis-Gardner
- No. 21.** *A Half Century with Rare Books* (1991) by Lawrence F. London
- No. 22.** *Frank H. Kenan: An Appreciation* (1992) edited by Archie K. Davis
- No. 23.** *Growing Up in North Carolina* by Charles Kuralt,
and *The Uncommon Laureate* by Wallace H. Kuralt (1993)
- No. 24.** *Chancellors Extraordinary: J. Carlyle Sitterson and LeRoy T. Walker* (1995)
by William C. Friday and Willis P. Whichard
- No. 25.** *Historical Consciousness in the Early Republic* (1995) edited by H.G. Jones
- No. 26.** *Sixty Years with a Camera* (1996) by Hugh M. Morton
- No. 27.** *William Gaston as a Public Man* (1997) by John L. Sanders
- No. 28.** *William P. Cumming and the Study of Cartography* (1998)
edited by Robert Cumming
- No. 29.** *My Love Affair with Carolina* (1998) by Doris Waugh Betts
- No. 30.** *A Single but Huge Distinction* (1999) by Reynolds Price
- No. 31.** *Richard Jenrette's Adventures in Historic Preservation* (2000)
edited by H.G. Jones
- No. 32.** *Sketches in North Carolina USA 1872 to 1878* (2001)
by Mortimer O. Heath; edited by H.G. Jones
- No. 33.** *Roots and Branches* (2001) by Wilma Dykeman
- No. 34.** *Glimmers in the Gloaming* (2002) by Frank Borden Hanes Sr.
- No. 35.** *Coming of Age in North Carolina's Fifth Century*,
by Maxine Swalin and *The North Carolina Symphony*, by John L. Humber (2003)
- No. 36.** *Reflections* (2004) by W. Trent Ragland Jr.
- No. 37.** *Photographers in North Carolina: The First Century, 1842-1941* (2004)
Essays by Stephen E. Massengill, H.G. Jones, Jesse R. Lankford
- No. 38.** *North Carolina Conundrum* (2005) by John Hope Franklin
- No. 39.** *Poetical Geography of North Carolina* (1887; 2006)
by Needham Bryan Cobb
- No. 40.** *The Goodliest Land* (2006) by Betty Ray McCain
- No. 41.** *Hayes: The Plantation, Its People, and Their Papers* (2007)
by John G. Zehmer Jr.

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SOCIETY IMPRINTS

- No. 42.** *Center of the Universe* (2007) by Fred Chappell
- No. 43.** *William B. Aycock: Our Champion* (2007) by Judith W. Wegner
- No. 44.** *Nathaniel Macon of North Carolina* (2008) by William S. Price Jr.
- No. 45.** *Robert Scott and the Preservation of North Carolina History* (2009) by H.G. Jones
- No. 46.** *A Historic Occasion* (2009) by Shirley Taylor Frye and Henry E. Frye
- No. 47.** *Surprise of the Century* (2009) by James E. Holshouser Jr.
- No. 48.** *The Colonial Records of North Carolina* (2010) edited by William S. Price Jr.
- No. 49.** *The Grandfathers* (2010) by Bland Simpson
- No. 50.** *A Resumé of Two Historic Adventures* (2011) by Lindsay C. Warren Jr.
- No. 51.** *Faces and Places of My Heart* (2012) by Lee Smith
- No. 52.** *A Love Affair with an Entire State* (2013) by Thomas W. Lambeth
- No. 53.** *Why Historic Preservation Matters* (2014) by Myrick Howard
- No. 54.** *A Place to Dig* (2015) by Herb Jackson
- No. 55.** *David Lowry Swain and the University of North Carolina, 1835-1868* (2016) by Willis P. Whichard
- No. 56.** *A North Carolina Country Boy* (2017) by H. David Bruton
- No. 57.** *Religious Traditions of North Carolina: Histories, Tenets, and Leaders* (2018) edited by Glenn Jonas
- No. 58.** *Reborn Digital* (2018) by Catherine Ward Bishir
- No. 59.** *Camp Bryan and a Tale of Two Letters* (2019) by Jerry Cotten, and *Going Home Again: The Return of Thomas Wolfe* (2019) by Alice Cotten
- No. 60.** *Jim Crow in North Carolina: The Legislative Program from 1865 to 1920* (2020) by Richard Paschal
- No. 61.** *Inside UNC-TV's North Carolina Bookwatch* (2020) by D.G. Martin
- No. 62.** *My Life of Breaking Barriers, Building Bridges, and Making History* (2021) by Howard N. Lee
- No. 63.** *An Artist's Perspective* (2022) by William Mangum
- No. 64.** *An Oboe Memoir* (2023) by Martin Brinkley
- No. 65.** *The Future of Our Histories* (2024) by Kevin Cherry



ABOVE: The original Society Award cup is in the North Carolina Collection at UNC-CH's Wilson Library. The plaques on the base of the cup is engraved with all recipients' names.

NORTH CAROLINIANA SOCIETY

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