

ANNUAL REPORT | 50TH ANNIVERSARY | 2024-2025

SO FAR
North Caroliniana
Society at Fifty:
An Overview



TOGETHER WITH
THE ANNUAL REPORT OF THE
NORTH CAROLINIANA SOCIETY,
2024-2025



ABOVE: The original Society Award cup in the North Carolina Collection at UNC-CH's Wilson Library. The interesting history of the master trophy representing the North Caroliniana Society Award is shared on the Society's website.

2024-2025 ANNUAL REPORT
NORTH CAROLINIANA SOCIETY

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PART I

SO FAR North Caroliniana Society at Fifty: An Overview

SO FAR North Caroliniana Society at Fifty: An Overview

• PART I

Fifty years ago, two key North Carolina archivists, former Wilson Library NC Collection curator William S. Powell and his successor Dr. H.G. Jones met with two major North Carolina public leaders — UNC System President William Friday of the University of North Carolina and Wachovia CEO Archie K. Davis, the four of them to discuss setting up an NC Collection support fund and a related organization to operate it.

By the time this collaborative meeting (presumably, though *not with certainty*, in Wilson Library on the UNC campus) had ended, these four had mapped out a new NC history and cultural preservation group, to be called the North Caroliniana Society, which Jones, Powell and Louis Connor Jr. would incorporate in September of 1975.

Since that time, the Society has honored with awards and banquet-gatherings the lives and careers of numerous noted North Carolinians; awarded annual prizes to the best North Carolina-focused books; supported the scholarship of numerous A.K. Davis fellows; given an annual award named in honor and memory of William S. Powell to a 3rd- or 4th-year UNC student who has shown an extraordinary interest and related work on the life of the University and/or history of the state; published dozens of imprints about the state; and contributed annually to the further development and expansion of the North Carolina Collection, the largest archive of state-focused publications and materials in the United States of America. Pages and listings of all the above, and more, may be found at the Society's website: <https://ncsociety.org/>, which all are invited to observe and tour.

The NCS has now become, by the time of its 50th anniversary (September 2025), a public charity (its funds held and managed by the UNC Investment Fund) with over \$6M in investment and quasi-investment funds, whose annual payouts go to support — in addition to the Wilson Library's North Carolina Collection (and the North Carolina Digital Heritage Center there, which grew out of the NCC and which links scores of smaller collections) — such other institutions and enterprises as: *NC Historical Review*; *NC Literary Review*; and NC History Day in early May, traditionally held at the NC Museum of History in Raleigh though, after that

Museum's closing for renovations, now held on the campus of UNC Greensboro. And the NC Division of Archives and History, one of our major beneficiaries, maintains an online collection of free lesson plans concerning North Carolina heritage.

The excellent NCS 2010 publication *What Is Past Is Prologue: The North Caroliniana Society's First Thirty-five Years 1975-2010* celebrates and covers the NCS as we saw it at the time of its 35th anniversary; this document may be found on the society's website: ncsociety.org.

So here in *this* report we celebrate and observe NCS doings since then, again seeking to bring our membership up-to-date, this time through the last fifteen years of its history (2010-2025), briefly reviewing important Society initiatives, events and endeavors during this time.

• PART II

COMMITTEE ON THE FUTURE

In 2011, seventeen years into his steady and buoyant presidency of the Society, Justice Willis Whichard wisely convened a committee, chaired by H. David Bruton of Moore County, to consider the future of our organization.

We met in Wilson Library on the UNC Campus and made several significant determinations, among them the decision to enlarge our membership from 198 to 250, recognizing the rapidly increasing population of North Carolina itself and wishing to have a diverse, wide-ranging, representative membership comprising leading citizens in the arts, the academy, and the professions (after making this increase incrementally, at ten new members per year for five years, we later felt it necessary to add another 25, and the current NCS membership is limited to 275). A second inspiring goal identified by the 2011-12 committee on the future directed us to find ways to help our public school teachers who are engaged in teaching NC history, geography, literature and lore in 4th and 8th grade classrooms, without prescribing what those ways might be — it would be several years before the key would turn on this grand, broad idea, and virtually everyone would agree that the wait was worth it. This important committee's May 2012 report would be edited by Dr. William Price and coded by Jason Tomberlin of Wilson Library.

ARCHIE K. DAVIS FELLOWSHIPS

Meanwhile, we continued to support the 1988 research program honoring Society co-founder Archie K. Davis. Fellows doing scholarly work with an essential North Carolina component were selected and funded. As travel expenses increased, the committee making these modest grants totalling \$20,000 made a key decision. Rather than make fifteen or twenty awards of \$500-\$1,000, the committee said: Let us raise the amount of the awards and reduce the number of applicants funded

continued

GENERAL OVERVIEW

annually. Now there are \$4,000-\$5,000 grants each year to four or five Davis Fellows. The value of these underwritings are quite clear, for example: Dr. David Silkenat of the University of Florida twice received Davis Fellowships, and his first two books, which grew out of that supported research (*Driven From Home: North Carolina's Civil War Refugee Crisis* (UGA Press, 2015) and *Moments of Despair: Suicide, Divorce, and Debt in Civil War Era North Carolina* (UNC Press, 2011), both received the North Caroliniana Society Book Prize.

PUBLICATIONS

We continued to publish, and to encourage publication, with a strong imprint series that included not only the speeches of our honorees and their colleagues at our annual meetings, but also several key books about topics not truly dealt with elsewhere, for instance: 1/ Justice Whichard and co-founder H.G. Jones commissioned Glenn Jonas to edit a collection of essays covering *Religious Traditions of North Carolina: Histories, Tenets and Leaders* (2018), which joined the earlier *Hayes: The Plantation, Its People, and Their Papers* (2007) by John G. Zehmer, Jr.; 2/ Whichard and Jones also encouraged Richard Paschal, with Oliver Orr Funds, in the writing of *Jim Crow in North Carolina The Legislative Program from 1865 to 1920* (2021). Whichard, it should be noted, was involved in these publication efforts all while writing his own impressive *A Consequential Life: David Lowry Swain, Nineteenth-Century North Carolina, and Their University* (which was brought out as part of UNC Press's [Albert & Gladys] Coates University Leadership Series, 2024). A revision and update of longtime Deputy Secretary of the N.C. State Archives Dr. Jeffrey Crow's classic 1992 book *A History of African Americans in North Carolina*, commissioned by the Society, was delayed by the cv-19 pandemic and we expect it to be delivered to us for publication in the near future.

Significant and most appreciated editorial work on Society publications over many years has been accomplished by: Dr. H. G. Jones, Imprints Nos. 1-50; Dr. Jeffrey J. Crow, Nos. 51-59; and Lynn Roundtree, Nos. 61-65. Roundtree would later be joined in drafting and editing the 2024 Strategic Plan by NCS board of directors member Eric L. Johnson. We owe immense gratitude to all who have served as editors on our publications.

WILLIAM C. FRIDAY TEACHER RETREATS

In the autumn of 2012, President Whichard met with Dr. Friday and got his deathbed assent to have a new Society fund named in his memory, the fund to be used for the professional development of NC heritage mastery among selected secondary teachers in the state. And to this end, in the middle of this decade, a most fortunate lunch meeting occurred, bringing Raleigh attorney Martin Brinkley, the Society's secretary-treasurer, together with Lloyd Kramer, Dean Smith Distinguished Professor of History, former UNC faculty chair and at the time Carolina Public Humanities director. What Professor Kramer proposed was simple and highly dynamic: an invitation to the Society to partner with CPH (an

effective intellectual and humanities events outreach unit of UNC Chapel Hill) and to fund an annual public-school teachers retreat in Chapel Hill and elsewhere in the state, aimed at those who taught the North Carolina courses we had noted in the 2011-12 strategic plan. The program would be named in honor and memory of our great friend, fellow NCS member, former Society president, longtime UNC President and incomparable, nationally-renowned educational leader William Clyde Friday: the William Friday Teachers Retreats, to bring thirty teachers per year to Chapel Hill, involve them in seminars led by exemplary scholars and artists from around the state, host them at the Carolina Inn and, all in all, treat those in the group with the respect and dignity they deserve and are too often denied — and try to help keep the best of our best in the profession.

Early in NC State University Professor of English and, as of 2014, NCS President James Clark's tenure, Secretary-Treasurer Brinkley brought this enthralling proposal — which promised to fulfill one of the pre-eminent goals of President Whichard's 2011-12 future of the Society committee, to the NCS board of directors. The response from the NCS board was powerfully positive and CPH's Carolina K-12 went to work at once — Professor Kramer and Christie Norris of Carolina K-12 found the initial response to their 2016 announcement of the first Friday Retreat nothing short of explosive: five hundred teachers applied for thirty spots, exposing a stunning unmet need for professional development among our public school educators.

Where Friday Retreats have met: initially in Chapel Hill and Asheville for a number of years, then in Beaufort (in 2023 and 2024), then Asheville in June 2025 (where the Friday Retreat will be again in 2026). Our 2023 efforts even engendered a Wayne County-area teachers' group to find support and to convene another group modeled upon ours in Beaufort only a month after the NCS Friday Retreat there! During the height of the cv-19 pandemic, with careful planning by Carolina K-12, in consultation with President Clark and the NCS executive committee and with board approval, the Friday Retreat activities were able to pivot and be presented online in a number of well-attended and felicitous ways, rather than risk the sort of in-person gatherings we would have preferred.

HAYES

We made a most successful, if uncharacteristic, intervention regarding the *ante bellum* home and farm Hayes in Edenton, to wit: the local group seeking to make Hayes (which comprises a phenomenal archive of all papers and material culture ever brought into it) a public-trust holding lacked the funding for an appraisal necessary before Hayes could be proposed to the NC General Assembly for acquisition by the state. The Society provided a modest grant for such an appraisal (\$30,500), and when the state budget passed in November 2021, not only did Hayes thereby become a public holding, to be managed by the Elizabeth Vann Moore Foundation, with help from the Edenton Historical Commission and the Town of Edenton, but also the legislature had added funds to start an interior-waters

continued

GENERAL OVERVIEW

passenger-ferry system headquartered in Edenton and serving historic riverports around the Albemarle Sound. The Society's swift yet thoughtful action had both advanced the Hayes goal and coincidentally helped leverage an impressive new, and needed, maritime venture, which came about in part soon *after* an exploratory, proof-of-concept 3-day Albemarle boat tour in 2018, supported by the NC Department of Natural and Cultural Resources and led by NCS members Kevin Cherry (then Deputy Secretary of DNCR); *Exploring North Carolina* host/writer/director Tom Earnhardt; renowned coastal historian David S. Cecelski; and longtime author of books on the natural world of NC's coast, UNC Professor Bland Simpson.

And this was all happening at a time not long before the Wilmington-based environmental group, the NC Coastal Land Trust, was about to be investing in conservation purchases in the immediate area of the mouth of the Chowan River: 1,000 acres along Salmon Creek and 17 acres of remaining Pleistocene seacoast bluffs at Point Comfort on the west banks of that river. Overall, the years just prior to and just after 2020 were an amazing few years of combined historic and environmental preservation in the western Albemarle, of which we played a key part.

OTHER PROJECTS

A major acquisition for UNC Chapel Hill, aided by Society negotiation and funding, was that of the entire collection of political cartoons created over five decades by celebrated *News & Observer* cartoonist Dwane Powell. Powell, a Distinguished Alumnus of the University of Arkansas-Monticello, was known as a "devastating caricaturist"; he published four collections of political cartoons, won both the Overseas Press Club Award for Excellence in Cartooning and the National Headliners Club Award for Outstanding Editorial Cartoons. The 3,850 items in the Dwane Powell portfolio are now housed in the Southern Historical Collection, Wilson Library, UNC Chapel Hill.

Some smaller projects we have supported, no less important to us and our mission than the larger ones, include: "*NC: A Portrait of Climate Change*," a touring exhibition of photographs organized by Carolina Public Humanities (CPH) as part of its "Climate Change" initiative. The exhibit features images from the Fall 2023 issue of *Southern Cultures* and includes accompanying student photographs. A grant of \$6,481 went to the UNC-Chapel Hill Libraries to have digital prints of hand-colored collotype reproductions of John White drawings professionally framed and matted in order to create a traveling exhibition, first displayed at the Dare County Art Council in Manteo in Spring 2022.

MEMBERS HONORED

Well worth noting, too, exemplary of all the strong cultural services our members constantly give to our state are these simple facts: just in the past few years, two of our members have been honored by the Governor with NC's high civilian honor, as have many others in times past: in November 2024, first-ever NC environmental attorney; NC Central Law professor; UNC TV conservationist-

communicator Tom Earnhardt received the North Carolina Award for Science; and, in November 2025, author-professor (and soon to be Floodplain Books store co-owner with his wife Mallory in Wilmington) Wiley Cash received the North Carolina Award for Literature. Also in November 2025, NCS Honoree Howard Lee, along with his wife Lillian Lee, were presented with the state's other high honor, membership in the Order of the Long Leaf Pine, at Chapel Hill's Town Hall, where Lee once served as Mayor, first African American mayor in the South since Reconstruction. A few years earlier, David Zucchini garnered his *second* Pulitzer Prize (general nonfiction, 2021) for his revelatory narrative, *Wilmington's Lie: The Murderous Coup of 1898 and the Rise of White Supremacy*. These are but a very few quite recently recognized examples of the significant contributions our members continue to make to the culture of North Carolina.

EXECUTIVE DIRECTOR

In 2019, as President Clark led the Society toward strengthening our governance, our processes and general organization, the NCS hired its first compensated coordinator, NCS executive director Copie Cain of Raleigh. Cain would soon have help from a Budget Committee, a Grants Review Committee, and from other positive internal changes that would ensure the Society and its officers and directors were well and properly insured, that our assets both financial and physical were well overseen (our investment accounts doubled under President Clark's watch, from \$3M to \$6M!), meaning that strict controls over our accounts in Chapel Hill and Raleigh were the equal of other respected, successful NC non-profits.

SOCIETY PRESIDENTS AND CO-FOUNDERS

For thirty of the Society's fifty years, two men have served as President, guiding our group with great calm, keenest intelligence and wit, and with vigor and spirit and vision, and, in addition to endeavors and initiatives mentioned above (and so many more), they have presided conservatively over the significant assets we have received and their growth to a level we might not have even imagined only twenty years ago, thus allowing the possibility of our providing stronger support to our collaborators than we could have done in earlier times. For their exemplary leadership and legacies of service, we abidingly honor: the late Justice Willis Whichard (NCS President, 1994-2014, and author of books about both James Iredell and David L. Swain), the only person in N.C. history to have served in both houses of the state legislature and on both N.C. appellate courts, NC Society Honoree in 2016; and Professor and author James W. Clark (NCS President, 2014-2024), who served on the North Carolina State University English faculty, significantly leading NCSU's Humanities Extension and Publications Program and spreading word of North Carolina's multicultural history throughout our public schools, also a member of the North Carolina Literary Hall of Fame, and North Caroliniana Society Honoree-to-be (May 21st, 2026). Both Presidents Whichard and Clark are past recipients of UNC Chapel Hill's Distinguished Alumnus Award.

continued

GENERAL OVERVIEW

We pause here, too, to remember, to thank, to honor and to salute the late North Caroliniana Society co-founders William Clyde Friday of Gaston County, N.C.; William Stevens Powell of Johnston County, N.C.; and Houston Gwynne (H.G.) Jones of Caswell County, N.C., all three of whom passed away in the same decade: in 2012 and 2015 and 2018, respectively. Their works *about* and *for* the Old North State, as authors, archivists, curators, historians and educators of the highest order are legion, and our love, respect and gratitude for them and their grand lives is unending.

For our co-founders and our longtime past presidents, only the words of the Preacher, in *Ecclesiastes 44:1-2*, will do:

*Let us now praise famous men, and our Fathers that begat us.
The Lord hath wrought great glory by them,
through his great power from the beginning.*

• PART III

Today, were the leadership of the North Caroliniana Society asked at this juncture, just a couple of months after the 50th anniversary of its incorporation, what the overall state of the Society is now, we would and could legitimately say: “So far,” and, literally, “so good.”

We intend nothing cryptic by this. We say it with pride, confidence and deep appreciation for all that our wonderful predecessors in the Society have given us to work with, yet also with a sense of realistic uncertainty, such as that currently faced, as never before, by our entire state and nation. Simply put, during an era when formerly secure institutions deserving our support are being undermined and destabilized, our vision of coming times may, on occasion, be clouded both as to what we may be called upon to do, and even what we may be able to do. Yet please know that with a thoughtful new strategic plan, eighteen highly reputable directors and an excellent executive director; a strong executive committee and expanded committee structure; and rigorous new financial controls, we will continue to protect vigorously the Society’s sterling reputation, its high principles and ethics, and its significant assets as we forge ahead, protecting, preserving and exploring, with the help of others, key elements of North Carolina’s natural and cultural history, over the millennia and up to its present day.

Carrying on as a Society into its second half-century, we are *so far* even more dedicated than ever to protect, to preserve, and to tell about this most remarkable state that we have inherited: for *all* the people who are here now, and for *all* those new North Carolinians who are on the way. This is a grand triple-helix of responsibility, opportunity and honor, and the members of the North Caroliniana Society accept it in our 50th anniversary year with energy, humility and joy.

Officers and Board of Directors 1975-2025

*Below is a list of those who have served as director and or officer
in the first fifty years (arranged in order of first election).*

* Deceased

- H.G. Jones, 1975 - 2018 (Founder/Incorporator 1975; Secretary-Treasurer 1975-2005; Secretary 2005-2010; Secretary-Treasurer Emeritus 2010-2018)*
- William S. Powell, 1975 to 2015 (Incorporator 1975; President 1975-1981; Vice President 1981-2010; President Emeritus 2010-2015)*
- Louis M. Connor, Jr., 1975 to 1988 (Incorporator 1975)*
- Archie K. Davis, 1980 to 1998 (Vice President 1980-1981; President 1981-1992; President Emeritus 1992-1998)*
- Gertrude Sprague Carraway, 1980-1984*
- William McWhorter Cochrane, 1985-2000*
- Frank Borden Hanes, Sr., 1985-1994*
- Betty A. Hodges, 1985-2005*
- Frank H. Kenan, 1985-1996*
- Henry W. Lewis, 1985-2004*
- George Elliott London, 1985-1993*
- Edward L. Rankin Jr., 1985-1994*
- William D. Snider, 1985-2003*
- William C. Friday, 1987-2012 (President 1992-1994; President Emeritus 1994-2012)*
- Willis P. Whichard, 1987-2025 (Vice President 1992-1994; President 1994-2014; President Emeritus 2014-2025)*
- Nancy Cobb Lilly, 1988-2019
- John L. Sanders, 1988-2021*
- H. David Bruton, 1994-2023 (Vice President 2010-2020; Vice President Emeritus 2020-2023)*
- Dana Borden Lacy, 1994-2020
- W. Trent Ragland Jr., 1996-2015*
- Robert W. Scott, 2000-2002*
- Kevin Cherry, 2002-2008 and 2021-present
- Martin H. Brinkley, 2003-present (Treasurer 2005-2010; Secretary-Treasurer 2010-2020; Secretary-Treasurer Emeritus 2020-present)
- James W. Clark Jr., 2004-present (Vice President 2012-2014; President 2014-2024)
- Danny Romine Powell, 2005-2021*
- Timothy B. Burnett, 2008-2020

c o n t i n u e d

BOARD OF DIRECTORS

- Bland Simpson, 2010-present (Vice President 2016-2024; President 2024-present)
- Thomas E. Terrell Jr., 2010-present
- Jason E. Tomberlin, 2010-2023 (Assistant Treasurer 2010-2023)
- Emily Williamson Gangi, 2013-present (Treasurer 2020-2022)
- Alice R. Cotten, 2015-present (Vice President 2021-present)
- Jeffrey J. Crow, 2015-present
- Anna R. Hayes, 2015-present
- Georgann Eubanks, 2019-present
- Darin J. Waters, 2019-2021
- C. Edward Teague III, 2020-present (Assistant Treasurer 2025-present)
- Patrick S. Wooten, 2020-present (Secretary 2020-2022; Secretary-Treasurer 2022-present)
- Margaret D. Bauer, 2021-present
- David S. Cecelski, 2021-present
- Tom Earnhardt, 2021-present
- Rebecca Godwin, 2021-present
- Leslie Dula McKesson, 2021-present
- Terry Roberts, 2021-present (Vice President 2024-present)
- Mike Wiley, 2021-present



*James W. Clark, Jr. (Society President, 2014-2024) and Bland Simpson (2024-present)
at the North Caroliniana Society's Annual Meeting and Awards Banquet, April 24, 2024*

North Caroliniana Society — Website

www.ncsociety.org

The North Caroliniana Society's website is designed to share more information and news about the Society, its activities and members.

It includes the following lists and documents:

- North Caroliniana Society Awards, 1978-2025
- North Caroliniana Society Book Awards, 2003-2025
 - William Stevens Powell Awards, 2002-2025
- North Caroliniana Society Publications, Numbers 1-66, 1978-2025
 - Archie K. Davis Fellowships, 1988-2025
- North Caroliniana Society Scholars in Residence, 2008-2011
- National History Day/H.G. Jones N.C. History Prizes, 1998-2025
 - Second Sunday Reading, 1992-2002
 - Bylaws
 - 2012 Committee on the Future
- 2019-2024 Strategic Plan and Priorities
 - 2024 Strategic Plan

PART II

Annual Report of the North Caroliniana Society 2024-2025

President's Report: Annual Meeting of the Membership

APRIL 13, 2025, PEMBROKE, NC

We, the North Caroliniana Society, are just over halfway into our 50th year, having been founded in Chapel Hill in September 1975 by our University President, William C. Friday; the president of Wachovia Bank, Archie K. Davis; and two archivist-historians, William S. Powell and H.G. Jones, who, in sequence, served as curators of the North Carolina Collection in UNC-Chapel Hill's Wilson Library for nearly forty years.

From within this collection, and for its benefit, the North Caroliniana Society was born. We are a nonprofit and a public charity, and with the annual earnings of our significant endowment and quasi-endowment funds — now standing at \$5.69M, held in UNC's Investment Fund — we now support not only the North Carolina Collection and the NC Digital Heritage Center, but also related institutions and activities such as the NC Office of Archives and History and the *NC Historical Review* and *NC History Day*; the William Friday Teachers Retreats planned and presented by the UNC Carolina Public Humanities' Carolina K-12 Program, this year to be held in Asheville; the *NC Literary Review*; and the Archie K. Davis Fellowships Program, which helps fund the NC-focused research of up to four scholars a year. In recent times, our funding for all this has averaged almost \$170,000 a year.

Over the past year, we have instituted more stringent financial practices than we had in the past, better to protect our funds in perpetuity. And we have adopted, as of last October, a new strategic plan, one of whose key recommendations was that we take more opportunities to get out into North Carolina and engage more with our people. All our people.

Indeed, we are most interested in, and hold as a central concern, the history, legends and lore, the stories, all that we can learn and know about how we have all come to be in this shared social and natural environment we call North Carolina: whether one's ancestors crossed the land-bridge 14,000 years ago; came here from the London slums or the Scottish Highlands, or Western Africa, three or four centuries ago; arrived from South America, southern Asia or the southeast Asian Highlands three or four decades ago; or from Nigeria or Ukraine in the last three or four years.

Got to realize we are one people, sang the great Jamaican singer-songwriter Bob Marley, and I cannot say it any clearer.



Society President Bland Simpson

I am pleased and proud that we are met today in Pembroke and Robeson County, in and on the land of the Lumbee, in order to hold our board meeting this morning, our annual meeting now, and, in just a few moments, our honors session, to present a beloved Lumbee elder with the North Caroliniana Society's highest award.

Our board will next meet in Asheville on the third of October, the 125th birthday of Thomas Wolfe, and there we will celebrate our group's 50th anniversary; our next annual meeting will be about this time next year, and all the while twixt now and then we will be looking forward to celebrations across the state of our nation's 250th anniversary of Independence in 2026.

Please let us remember: North Carolina joined the Federal Union in November 1789 *only* after President Washington agreed — at North Carolina's insistence — to add a Bill of Rights to the US Constitution. Let us hold these rights, and those that have come after the original ten, including the essential of birthright citizenship, most dear.

Thank you all for joining our gathering here today on the banks of the Lumber River.

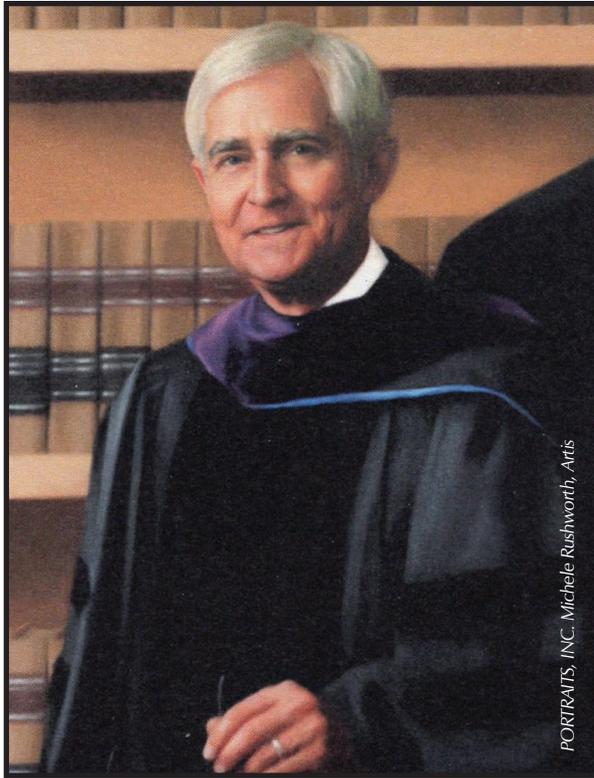
North Caroliniana Society Member Necrology

- Dr. Max R. Williams, *member since 1987* (1933 – January 24, 2021)
- Danyne Romine Powell, *member since 2003* (January 4, 1941 – October 10, 2024)
 - Leslie Anderson, *member since 2016* (June 28, 1950 – December 27, 2024)
- Joseph S. Ferrell, *member since 2016* (September 11, 1938 – January 29, 2025)
 - Charles P. Gaylor, III, *member since 2019* (December 6, 1949 – July 1, 2025)
- Charlotte Vestal Wainwright, *member since 2011* (June 3, 1942 – November 9, 2025)
 - Willis P. Whichard, *member since 1976* (May 24, 1940 – November 18, 2025)
 - D.G. Martin, *member since 2008* (May 24, 1940 – Decemebr 9, 2025)

IN MEMORIAM

In Memoriam: Willis P. Whichard

MAY 24, 1940 - NOVEMBER 18, 2025



*Justice Willis P. "Bill" Whichard
North Caroliniana Society President, 1994-2014*

When Willis Whichard was honored by the Society with the North Caroliniana Society Award in 2016, Whichard said, upon accepting the award, "There are people here tonight who have inspired, influenced, and assisted me. There are others who are not here, and many more who, in Shakespeare's phrase, have now parted 'this mortal coil.' ... My wish and prayer would be that I, and all of us, would have those roles with the generation now coming along and its successors."

A TRIBUTE: NO DARKNESS HERE by James W. Clark, Jr.

Not long after Bill Whichard handed me the gavel of the North Caroliniana Society in 2014, he, Martin Brinkley, and I were having lunch near the Raleigh-Durham Airport. Our conversation turned to my health, I having recently received a stent after a heart episode. Bill said, all smiles, something to this effect: "Jim, for two decades I presided over the Society. It tried to kill you in just over a month." We laughed and went on with our lunch and discussing the road ahead.

Looking back on the decade Bill and I were closely associated since then, I want to place five stars by the Honorable Judge's storied name.

- ★ Order always prevailed in his Society venue; all minutes were examined and corrected as necessary.
- ★ He deeply revered William C. Friday and Houston G. Jones and championed his reverence of them to the lasting benefit of the Society and the State of North Carolina.
- ★ Bill was as well and as resourcefully connected as any person I have ever known; yet he met others as one of them and not as a polymath, a trait that drew especially teachers to him as the Society is committed to support their professional development.
- ★ In our personal conversations he advised me pointedly and just as specifically sought from me the names of North Carolina authors we might read and discuss together as lifelong learners; we spoke of Thomas Wolfe, Fred Chappell, Wilma Dykeman, Paul Green, Bernice Kelly Harris, and Doris Betts.
- ★ My fifth star is for Bill Whichard's splendid carriage, his honesty of manner, spirit, and character.

Annual Membership Meeting and Awards Ceremony

APRIL 13, 2025

UNIVERSITY OF NORTH CAROLINA AT PEMBROKE

Society members gathered with friends and family in Pembroke, NC on April 13, 2025, to celebrate and honor the Society's award recipients. With an introduction by Georgann Eubanks, the Sunday afternoon program by Dr. Jo Ann Chavis Lowery was followed by a musical tribute and a smudging.

Number 66 of the North Carolina Society Imprints, titled *A Woman of the Dark Water: A Pathmaker and A Wisdomkeeper* by Dr. Jo Ann Chavis Lowery, includes an address by the winner of the Society's 2025 Society Award.

Imprint Number 66 also includes praise for *George Masa: A Life Reimagined* by Janet McCue and Paul Bonesteel, winner of the Society's 2024 Book Award, and 2025 Carolina graduate Anna Marie Switzer who received the William Stevens Powell Award.

Videos of the celebration in Pembroke, NC on April 13, 2025 can be found on the Society's website: www.ncsociety.org.



Anna Marie Switzer, 2025 Powell Award; Dr. Jo Ann Chavis Lowery, 2025 Society Award, Paul Bonesteel, 2024 Book Award

2025 NORTH CAROLINIANA
SOCIETY AWARD:
**Dr. Jo Ann
Chavis Lowery**

This year the Society Board of Directors voted to award the fifty-sixth North Caroliniana Society Award to Dr. Jo Ann Chavis Lowery, a deeply revered Lumbee tribal elder, counselor, historian, and longtime educator whose quiet grace and wisdom moves all who meet her.

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.



Dr. Jo Ann Chavis Lowery

2024 NORTH CAROLINIANA SOCIETY BOOK AWARD: George Masa: A Life Reimagined

BY JANET MCCUE AND PAUL BONESTEEL

This year the North Caroliniana Book Award was awarded to Janet McCue and Paul Bonesteel, authors of *George Masa: A Life Reimagined*. During the afternoon's award presentation, Mike Hill, Book Award Committee Chair, shared

"This year's award recipient, Drew Swanson, is Jack N. and Addie D. Averitt Distinguished Professor of Southern History at Georgia Southern University in Statesboro. Born in southside Virginia, he attended Lees-MacRae College and Appalachian State University before completing his Ph.D. at the University of Georgia. Among his previous books is one about brightleaf tobacco. The present book is a powerful and insightful study of an event in 1870 that led to the so-called "Kirk-Holden War" and the impeachment and removal of Governor W. W. Holden. The murder of state senator John Stephens at the Caswell County Courthouse, along with the mutilation and hanging of Wyatt Outlaw in Alamance County, was the culmination of Ku Klux Klan violence in the region during that period."

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."



Paul Bonesteel and Janet McCue

2025 WILLIAM STEVENS POWELL AWARD: Anna Marie Switzer

English and History Honors Major Anna Marie Switzer '25, a fine storyteller and terrific scholar, served as the archives and communications intern at the Core Sound Waterfowl Museum and Heritage Center at Harkers Island beginning in May 2024. There she produced new oral histories and emphasized community engagement. She has done magazine editorial work and writing for *Walter, Cellar Door*, and UNC's *Journal of History*, and in Earth, Marine & Environmental Studies/English 473 (Fall '24), she created short fiction based on her coastal interviews. "Nobody Cried When He Died" weaves strands of social history from Diamond City's stormy 1890s, the coming of World War II, and the lead character's wartime work at MCAS Cherry Point.

She is from Charlotte, NC, and after graduation, she will be working for Epic Systems in Wisconsin. She hopes to eventually attend graduate school.

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 or of the state of North Carolina.



LEFT: Bland Simpson presenting Anna Marie Switzer with the William S. Powell Award

RIGHT: Alice R. Cotten, Society Vice President, with Anna Marie Switzer,
UNC Chapel Hill Chancellor's Awards Program, April 22, 2025

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 2025: Four 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
- *The North Carolina Historical Review*
- North Carolina Collection, Wilson Library, UNC-CH
- Primary Sources Teaching Fellows for North Carolina Heritage
- Online Exhibits Project
- Portraits of Climate Change in NC: Snapshots and Stories of a Transforming State
- *The North Carolina Literary Review*
- William Friday Teacher Education Initiative
 - The Annual William Friday Teacher Retreat
 - Testimonials from Initiative Participants

FOLLOW UP:

The North Carolina African American Heritage Committee and Office of Archives and History Book project (2021-2022 fiscal year funding) continues to make progress with a delayed publication date of 2026.

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.

2024-2025 FELLOWS:

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

- Chloe Landen
"Anti-Lynching Activism, Religion, and the Rise of Privatized Execution: A Look at the Legacy of The Association of Southern Women for the Prevention of Lynching"
- Ashley LaRue Low
Tar Heels & Torah: Southern Jewish History in North Carolina, 1900-2010
- Trevor McKenzie
You Soon Shall Hear: The Unsung History of Appalachia in 20 Ballads
- Olivia H. Phillips
"Sometimes I'm in this Country": Traditional Singing and Heritage Narratives in North Carolina's Beech Mountain Community



TOP: Chloe Landen, Ashley LaRue Low

BOTTOM: Trevor McKenzie, Olivia H. Phillips

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.

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:
“RIGHTS AND RESPONSIBILITIES IN HISTORY”

- | | | |
|--|--|---|
| • STATEWIDE
5,319 Students
97 Schools
41 Counties | • STATE CONTEST
412 Students
64 Schools
28 Counties
239 Total Projects | • NATIONAL CONTEST
67 Students
24 Schools
13 Counties
35 Projects |
|--|--|---|

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:**
“Chords of Defiance: The Resistance of the Wilmington Ten” Students:
Lyla Varnum and Abigail Blair of The International School at Gregory,
New Hanover County (Teacher: Sarah Stepanski)
- **Senior Division performance:**
“Silenced: How NC’s Public Employees Lost Their Voice” Students:
Finn McElwee and Suh Hee Shin of Chapel Hill High School, Orange County
(Teacher: Veena Anglin)



*LEFT: Bland Simpson, President, North Caroliniana Society; Abigail Blair; Lyla Varnum:
Dr. Darin Waters, Deputy Secretary, NC Office of Archives and History*
*RIGHT: Bland Simpson, President, North Caroliniana Society; Finn McElwee; Suh Hee Shin:
Dr. Darin Waters, Deputy Secretary, NC Office of Archives and History*

continued

NATIONAL CONTEST RESULTS:

- **Third Place National Awards:**
 - *Senior Group Website: Stolen Childhoods* — Classical Scholars, Henderson County
 - *Senior Individual Website: ‘You Can’t’: The Rights and Responsibilities of Neurodivergent Children* — Classical Scholars, Henderson County
 - *Junior Paper: An Image of America: Photographer Russell Lee* — Cratty Family Homeschool, Orange County
- **Top Ten Finalists:**
 - 6th Place — *Junior Group Exhibit: If Only: The Story of the Wilmington Ten* — Holly Shelter Middle, New Hanover County
 - 6th Place — *Junior Group Performance: Society of the Living Dead* — Classical Scholars, Henderson County
 - 7th Place — *Senior Individual Exhibit: Explicit Content: How Censorship Led to Lyrical Liberation* — Wilmington Early College High, New Hanover County
- **North Carolina Outstanding Entry Awards:**
 - *Junior Division: If Only: The Story of the Wilmington Ten* — Holly Shelter Middle
 - *Senior Division: Autonomy’s Paradox: Kosovo’s Sovereignty* — NC School of Science and Mathematics
- **National Showcase Selections (Washington, D.C.):**
 - *Documentary Showcase* — National Museum of African American History and Culture — *The WTO: Balancing Rights and Responsibilities in Global Trade* Hashi Lucksanapirak — Alston Ridge Middle School, Wake County (Teacher: Lynn Luke)
 - *Exhibit Showcase* — National Museum of American History - The Federal Government and the Broken Promises (focused on the building of Fontana Dam in Swain County) Elsie-Mae Clayton — Swain County Middle, Swain County (Teacher: Megan Lucas)
 - *Paper Showcase* — White House Historical Association — *‘Not in Our Name’: The Central American Sanctuary Movement and the Struggle for Salvadoran Asylum Rights* Andrew Larsen — Watauga High School, Watauga County (NHD Mentor: Ellen Lamont)
 - *Performance Showcase* — National Museum of American History — *Nothing About Us Without Us: How One Group of Disability Rights Activists Fought for Recognition by Forcing the Government to Accept Responsibility for Discrimination* Ava Karis Renegar, Campbell Hodge, Elianna Yoder, Jonah Hardin, Kyle Malt — Classical Scholars, Henderson County (Teacher: Eliza Hardin)



June 2025, University of Maryland: NC students at the award ceremony for the National Contest, including Timothy Hughes, a member of the National History Day Board of Trustees and a former NC History Day alum.

Additionally, two **North Carolina educators** were recognized as national nominees for the **National History Day Teacher of the Year Award**:

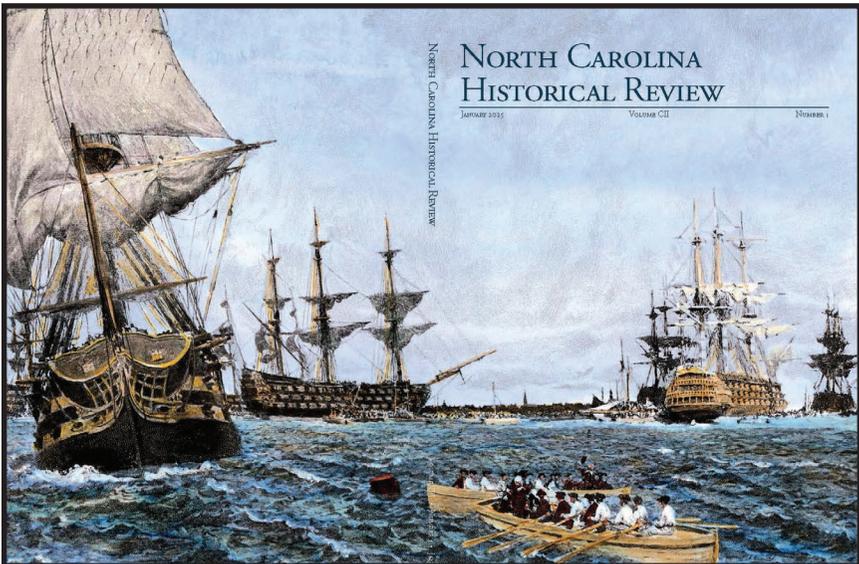
- Jeffrey “Sean” Stanek — Holly Shelter Middle, New Hanover County (Top 5 national finalist)
 - Emily Lemus — EDGE Academy of Health Sciences, Edgecombe County
- North Carolina’s student work also received **national media attention**, including features in *The New York Times* and *USA Today*, further highlighting the impact and excellence of the program.

THE NORTH CAROLINA HISTORICAL REVIEW

(funding: Cashion-Steelman and Archie K. Davis Funds)

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 \$14,000 to the N.C. Department of Natural & Cultural Resources to publish the Review. These funds covered approximately 37% of the total cost of printing and fulfillment of Volume 102 of the Review. For Volume 102, 550 copies were printed for over 350 subscribers per issue. The Review is available in electronic form through Ebsco and JSTOR, with some restrictions.



Cover of North Carolina Historical Review January 2025 Volume CII, Number 1

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 collection comprises three divisions: the Research Library, North Carolina Collection Gallery, and Photographic Archives. 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 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.

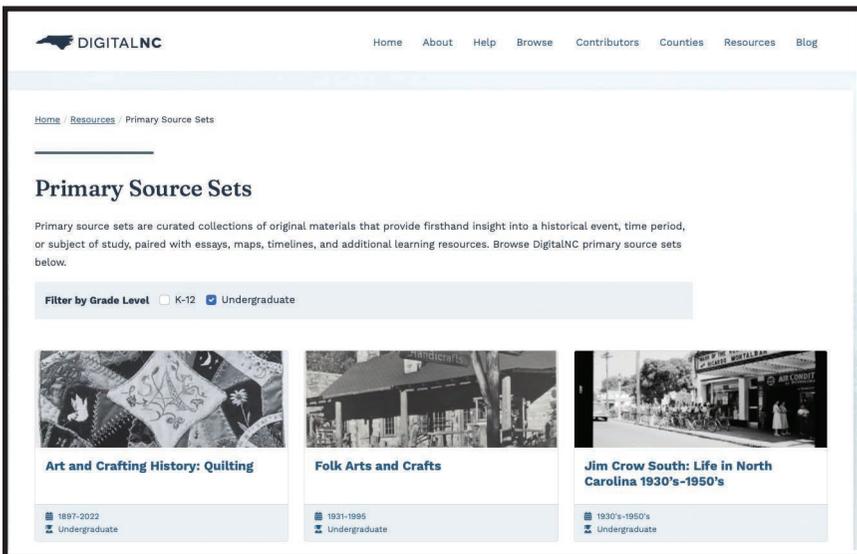
The North Carolina Collection began collecting photographs in 1929. Today, the North Carolina Collection Photographic Archives contains more than 3,000,000 items, from daguerreotypes to digital photographs. The photographs are descriptive and documentary in nature. They provide a visual record of North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

PRIMARY SOURCES TEACHING FELLOWS FOR NORTH CAROLINA HERITAGE

(funding: Dana B. Lacy, W. Trent Ragland, Jr. and Alice and Jerry Cotten, NC Society Book, William S. Powell and Archie K. Davis Funds)

The Society continued its support of the North Carolina Collection, contributing \$34,896 to the University Libraries at the University of North Carolina at Chapel Hill to plan, develop, research, create and publish primary source sets.

The primary source toolkits include links to and images of material from the North Carolina Digital Heritage Center's (NCDHC) digitized resources as well as guidelines for using these documents in instructional settings. These resources are freely available on NCDHC's website (www.digitalnc.org). These primary source sets will provide university professors and instructor with an easier — but authoritative — way to integrate North Carolina history, literature, and culture in their courses.



DigitalNC website, displaying Primary Source Sets

ONLINE EXHIBITS PROJECT

(funding: W. Trent Ragland Jr. Fund)

The Society continued its support of the North Carolina Collection, contributing \$17,680 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 will continue 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.

- Priceless Gems: Treasures from Carolina's Past

<https://exhibits.lib.unc.edu/exhibits/show/priceless/introduction>



UNC University Libraries website, displaying online exhibit Priceless Gems

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.

The Society continued its support of 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.

Using last year’s support, Carolina Public Humanities partnered with Wayne Community College and corresponding faculty liaisons, to feature a talk by UNC-CH Dean of UNC’s College of Arts and Sciences and Climate Scientist, Jim White. The event included a photo contest, featuring 7 entries by community college staff, faculty and students.

Plans for future collaborations continue. Three events, possibly in 2026, are expected.



Students and Participants at the Wayne Community College event on March 31, 2025 including UNC College of Arts & Sciences Dean Jim White, lower left photo

THE NORTH CAROLINA LITERARY REVIEW

(funding: Archie K. Davis Fund)

The North Carolina Literary Review (NCLR), produced at East Carolina University, publishes interviews and literary criticism about North Carolina writers and high-quality poetry, fiction, drama, and creative nonfiction by North Carolina writers or set in North Carolina. Our definition of a North Carolina writer is anyone who currently lives in North Carolina, has lived in North Carolina, or uses North Carolina as subject matter.

A cross between a scholarly journal and a literary magazine, NCLR has won numerous awards and citations.

The Society supported the *North Carolina Literary Review*, contributing \$10,000 to East Carolina University to assist in publishing the Review. These funds covered a portion of the cost of the new Digital Editor. There has been an expanded digital reach of the vibrant website and social media platforms (11,000 website users; 37,700 Facebook visitors; 6,000 Instagram visitors).



Devra Thomas, Digital Editor for the North Carolina Literary Review, reading the 2025 North Carolina Literary Review, issue number 34.

WILLIAM FRIDAY TEACHER EDUCATION INITIATIVE

(funding: H.G. Jones Restricted, Archie K. Davis,
and William C. Friday 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 The Society continued its support of The William Friday Teacher Education Initiative, contributing \$42,000 to Carolina Public Humanities as part of their continuous commitment to provide support to North Carolina students and teachers.

In late June and early July 2025, Carolina K-12 and the North Caroliniana Society served 40 teachers from 13 counties at the annual William Friday Teacher Retreat. This special group of educators were treated to three full days of learning and fun in Asheville, Lake James State Park, Thomas Wolfe Memorial State Historic Site, and Cherokee, NC. In addition to plenty of pampering at the Grove Park Inn and experiencing a performance of Unto These Hills Outdoor Drama,

continued

PROGRAMS, GRANTS AND PROJECTS

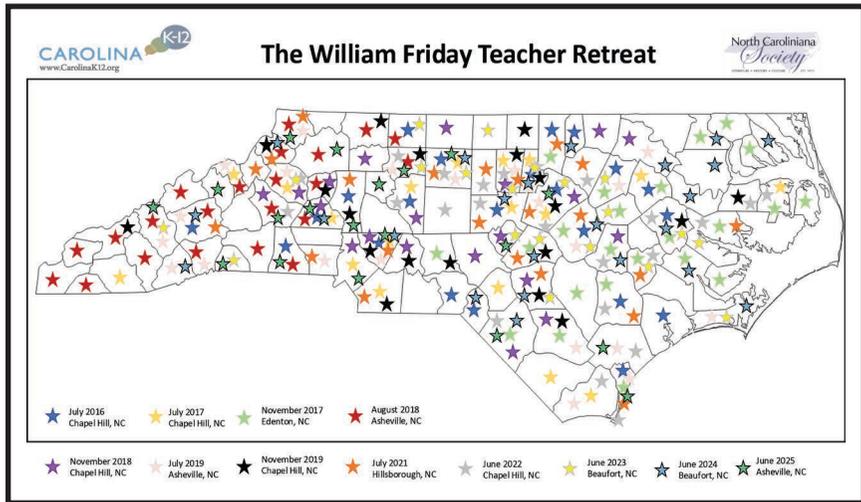


Asheville, NC June/July 2025: William Friday Teacher Retreat: Rooted in Resilience

PROGRAMS, GRANTS AND PROJECTS

participants deepened their content and pedagogical knowledge, hearing from decorated scholars and local experts: Donovan Livingston, Josh Goforth, Christie Norris, Devra Thomas, Vanessa Miller, Terry Roberts, Erin Derham, and Annette Clapsaddle.

To date, 436 public school teachers from 86 NC counties have participated in the 12 annual William Friday Teacher Retreats. These teachers will reach a minimum of 61,040 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.



TESTIMONIALS FROM INITIATIVE PARTICIPANTS:

“Thank you so much for providing the funding for us to participate in this amazing professional development. The care and respect we received was so refreshing. In this retreat I not only learned a great deal about our amazing state and its writers but I also formed connections with other like-minded educators that value the importance of public education. I walked away refreshed, feeling valued, and full of ideas I will bring back to my middle school classroom. Thank you for the opportunity to attend.”

“It is important that teachers receive free and quality professional development because they can help make a true difference in a teacher’s career... It made the educators leave feeling appreciated, inspired, and ready to implement more North Carolina history and literature in their classrooms.”

Minutes of a Meeting of the Board of Directors

OCTOBER 30, 2024
WILSON LIBRARY, CHAPEL HILL, NC

Pursuant to notice duly given, President Bland Simpson, called a meeting of the Board of Directors of the North Caroliniana Society, Inc. to order at 12:16 p.m. on Wednesday, October 30, 2024.

Present in addition to the President were Vice President Terry Roberts, Secretary-Treasurer Patrick S. Wooten, President *emeritus* Willis P. Whichard, Executive Director Copie Cain, and the following members of the Board of Directors: Margaret D. Bauer, Tom Earnhardt, Georgann Eubanks, Emily Williamson Gangi, Rebecca Godwin, Anna R. Hayes, Eric L. Johnson, C. Edward Teague III. Also present were *ex officio* directors Vicki Rovine, Director of Carolina Public Humanities and Jason Tomberlin, Chair & Facilitator, Archie K. Davis Fellowship.

President Simpson welcomed those present to Wilson Library. He welcomed new Board members Richard Stevens (unable to attend); Lisa Gregory, Interim Curator of the North Carolina Collection (unable to attend); and Jason Tomberlin, Chair and Facilitator of Archie K. Davis Fellowship Committee. All members were asked to introduce themselves.

On motion of Mr. Roberts, seconded by Mr. Earnhardt, the minutes of the Board of Directors meeting, held on April 24, 2024, in Chapel Hill, were approved as distributed.

On motion of Mr. Teague, seconded by Ms. Eubanks, Board actions via email from June 13, 2024, to October 15, 2024, listed in [Appendix A](#), were ratified.

Executive Director Cain introduced Ms. Susan Glendenning of Maddison & Caison for presentation of the draft review of the 2023-2024 Review Report and Financials and Form 990. Ms. Glendenning pointed out a few items related to the Society's financials: market gains during the fiscal year, amounts available for operations, and investments in the UNC Investment Fund.

On motion of Mr. Teague, seconded by Mr. Earnhardt, the Reviewed Financials and Form 990 for the year ending June 30, 2024, were accepted as reviewed and circulated, subject to the change in one footnote, if appropriate.

Secretary-Treasurer Wooten shared an updated Conflict of Interest Policy ([Appendix B](#)). On motion of Mr. Roberts, seconded by Mr. Teague, the policy was approved.

continued

MINUTES

Executive Director Cain shared that the Society's new insurance broker, Indaco Risk Advisors, is serviced by her son, Quentin Cain. Indaco Risk Advisors has prepared a proposal for additional coverage, for the Society's consideration. President Simpson asked Ted Teague and Patrick Wooten to gather a committee to meet with the agent and present to the Executive Committee for future consideration.

President Simpson asked for a five-minute recess.

President Simpson commented on, and the Board discussed, the effectiveness of the collaboration with Carolina Public Humanities, which created the William Friday Teacher Education Initiative.

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, the North Carolina Historical Review, North Carolina Collection's digitized gallery exhibits project, and the William Friday Teacher Initiative, including an annual in-person teacher retreat in Beaufort. Executive Director Cain also reviewed the grants approved, soon to be paid out, for the Society's fiscal year ending June 30, 2025.

President Simpson asked Ms. Rovine to comment on the Carolina Public Humanities (CPH) projects: Friday Retreat and the Portraits of Climate Change. Ms. Rovine acknowledged the work Paul Bonici has been doing and shared that CPH has hired Cori Greer-Banks to take the position of the Director of Carolina K-12, previously held by Christie Norris. Ms. Rovine thanked the Society for their continued support.

President Simpson shared that Interim Curator Lisa Gregory's report for the North Carolina Collection and Deputy Secretary Darin Water's report for the Office of Archives & History and their projects will be shared via email.

Secretary-Treasurer Wooten shared Board member Kevin Cherry's request for the Society and/or the Board to visit Edenton. Mr. Earnhardt inquired if there is a way to support Western North Carolina, possibly holding a Board meeting there. President Simpson asked for a motion to amend the agenda to include a New Business section to discuss these matters (adding it just above the 50th Anniversary section). On motion of Mr. Earnhardt, seconded by Ms. Eubanks, the addition to the agenda was approved.

President Simpson asked for comments and suggestions regarding the spring 2024 event at Carolina Inn which was followed by discussion.

President Simpson recognized Mr. Earnhardt as recipient of the 2024 North Carolina Award for Science, the state's highest civilian honor.

President Simpson reminded Board members that Dr. Jo Ann Chavis Lowery was to be honored with a Society Award this fall but the event had to be postponed. President Simpson presented Dr. Jo Ann Chavis Lowery as the 2025 Society Award honoree. On motion of Ms. Gangi, seconded by Ms. Bauer, the nominee was approved. Executive Director Cain announced Sunday, April 13,

2025, as a tentative date for the next Board meeting and Awards celebration.

President Simpson shared the Nominating Committee's plan to meet in February 2025 to review the membership roster and nominations. Executive Director Cain shared that Membership Nomination forms are included in the Annual Appeal letter mailing. Members are invited to make nominations any time during the year.

President Simpson asked Mr. Johnson to present the 2024 Strategic Plan which was put together by Eric Johnson and Lynn Roundtree, reviewed and edited by the Executive Committee, and previously shared with all Board members and the Strategic Plan committee, via email, for comments and questions. Mr. Johnson shared how helpful the day-long working session was to the process. Ms. Gangi asked for an amendment to the Membership & Engagement section, to better reflect the ethnic and racial diversity of the state. On motion of Mr. Teague, seconded by Ms. Gangi, adoption of the 2024 Strategic Plan, as to be amended by Mr. Johnson, was approved.

President Simpson asked to move to New Business, which includes ideas discussed at previous various meetings:

- Connecting NC Collection with ECU collection
- Dedicated (full or part-time) communication person for the Society (Rovine)
- Podcast, TV (Johnson)
- "NC for new North Carolinians"
- Publication – ecology of historic sites (Clark)
- Thomas Wolfe cabin (Simpson/Roberts)
- Marrying natural and cultural resources (Earnhardt)

Discussion ensued regarding Society involvement: How items of interest (social support and financial support) are reviewed and accepted by the Society.

Mr. Teague referenced the Strategic Plan, regarding the Grant Review Committee's responsibilities. President Simpson asked Board members on The Grant Review Committee to plan to review and report back to the Executive Committee with recommendations regarding:

- Maintain a core stable of long-term, committed partnerships and dedicate nondiscretionary resources to sustain them.
- Study how the Society can entertain one-time projects or pilot collaborations and set consistent guidelines for awarding those funds (a possible *catalyst/opportunity fund*).
- Continue to establish consistent criteria (with the Grant Review Committee) for soliciting and evaluating funding proposals, offering a clear rationale for how all funded projects contribute to the Society's mission and report on the impact of such expenditures.

President Simpson presented a plan to have a Board meeting in Edenton. Ms. Eubanks shared that the 50th Anniversary is an opportunity to celebrate 50 years and celebrate initiatives. Board members discussed a fall 2025 meeting in Western

continued

MINUTES

NC and a spring 2026 meeting in Edenton, in conjunction with the 250th Anniversary in 2026.

The meeting was adjourned at 3:04 p.m.

APPENDIX A

NORTH CAROLINIANA SOCIETY

Board actions by email –

April 25, 2024 to October 30, 2024

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

JUNE 13, 2024

CONTINUING RESOLUTIONS - APPROVED

North Caroliniana Society (NCS) – Continuing Resolutions

June 2024 (*edits to April 24, 2024 version*)

1. That the University of North Carolina Foundation Investment Fund and Wells Fargo Bank, N.A. be authorized depositories of the Society's funds;
2. That the signature of the NCS Executive Director, Copie Cain (noted as Key Executive on the accounts), the NCS Secretary-Treasurer, Patrick Wooten, or the NCS Vice President, Alice Cotten, be authorized to access all accounts and funds of the Society held at Wells Fargo Bank, N.A.;
3. That authorized access to all accounts and funds of the Society held at the University of North Carolina Foundation Investment Fund shall require the signatures of two of the following persons: NCS President Bland Simpson; NCS Vice President Terry Roberts; or NCS Executive Director Copie Cain;
4. That the Executive Director and the Secretary-Treasurer, in furthering the interests of the Society, be authorized to make expenditures from the Society's funds in amounts consistent with the Society's budget approved by the Board of Directors; provided, however, that expenditures in excess of that amount may be made upon approval of a majority of the Executive Committee of the Board of Directors; provided, however, that no expenditures shall contravene the internal financial control policy adopted by the NCS Board of Directors;
5. That the Archie K. Davis Fellowship Committee, appointed by the Executive Committee of the Board of Directors, be authorized to evaluate applications for Archie K. Davis Fellowships and make awards, reporting to the next meeting of the membership.

APPENDIX B

NORTH CAROLINIANA SOCIETY CONFLICT OF INTEREST POLICY

• ARTICLE I PURPOSE

This conflict of interest policy is designed to foster confidence in the integrity of the NORTH CAROLINIANA SOCIETY (the “Organization”) and to protect the Organization’s interest when it is contemplating entering a transaction (defined below) that might benefit the private interest of an insider (defined below). The policy also addresses situations in which any of these insiders may directly or indirectly benefit, except as the Organization’s employees or members of its board or other governing body, from the Organization’s disbursing of funds, and shall include actions to be taken by the Organization or the insider, or both, to avoid conflicts of interest and the appearance of impropriety.

• ARTICLE II DEFINITIONS

The following are considered *insiders* for the purposes of this policy:

1. Each member of the Organization’s Board.
2. The Executive Director, Chief Financial Officer, or any person with the responsibilities of any of these positions.
3. Any *key employee* who (a) has responsibilities or influence over the organization similar to that of Board members; or (b) manages a program that represents 10% or more of the activities, assets, income, or expenses of the organization; **or** (c) has or shares authority to control 10% or more of the organization’s capital expenditures, operating budget, or compensation for employees.

Interest means any commitment, investment, relationship, obligation, or involvement, financial or otherwise, direct or indirect, that may influence a person’s judgment, including receipt of compensation from the Organization, a sale, loan, or exchange transaction with the Organization.

A *conflict of interest* is present when, in the judgment of the Board, an insider’s stake in the transaction is such that it reduces the likelihood that an insider’s influence can be exercised impartially in the best interests of the Organization.

Transaction means any transaction, agreement, or arrangement between an insider and the Organization, or between the Organization and any third party where an insider has an interest in the transaction or any party to it.

continued

MINUTES

• ARTICLE III PROCEDURES

1. *Duty to Disclose*

Each insider shall disclose to the Board all material facts regarding his or her interest in the transaction, promptly upon learning of the proposed transaction.

2. *Determining Whether a Conflict of Interest Exists*

With regard to an insider, the Board shall determine if a conflict of interest exists. The insider(s) and any other interested person(s) involved with the transaction shall not be present during the Board's discussion or determination of whether a conflict of interest exists, except as provided in Article IV below.

3. *Procedures to Address a Conflict of Interest*

The Board shall follow the procedures set forth in Article IV in order to decide what measures are needed to protect the Organization's interests in light of the nature and seriousness of the conflict, to decide whether to enter into the transaction and, if so, to ensure that the terms of the transaction are appropriate.

• ARTICLE IV REVIEW BY THE BOARD

The Board may ask questions of and receive presentation(s) from the insider(s) and any other interested person(s), but shall deliberate and vote on the transaction in their absence. The Board shall ascertain that all material facts regarding the transaction and the insider's conflict of interest have been disclosed to the Board and shall compile appropriate data, such as comparability studies, to determine fair market value for the transaction.

After exercising due diligence, which may include investigating alternatives that present no conflict, the Board shall determine whether the transaction is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable to the Organization; the majority of disinterested members of the Board then in office may approve the transaction.

• ARTICLE V RECORDS OF PROCEEDINGS

The minutes of any meeting of the Board pursuant to this policy shall contain the name of each insider who disclosed or was otherwise determined to have an interest in a transaction; the nature of the interest and whether it was determined to constitute a conflict of interest; any alternative transactions considered; the members of the Board who were present during the deliberations on the transaction, Those who voted on it, and to what extent interested persons were excluded from the deliberations; any comparability data or other information obtained and relied upon by the Board and how the information was obtained;

and the result of the vote, including, if applicable, the terms of the transaction that was approved and the date it was approved.

• **ARTICLE VI**
ANNUAL DISCLOSURE AND COMPLIANCE
STATEMENTS

Each insider of the Organization shall be provided a copy of this policy.

• **ARTICLE VII**
VIOLATIONS

If the Board has reasonable cause to believe that an insider of the Organization has failed to disclose actual or possible conflicts of interest, including those arising from a transaction with a related interested person, it shall inform such insider of the basis for this belief and afford the insider an opportunity to explain the alleged failure to disclose. If, after hearing the insider's response and making further investigation as warranted by the circumstances, the Board determines that the insider has failed to disclose an actual or possible conflict of interest, the Board shall take appropriate disciplinary and corrective action.

• **ARTICLE VIII**
ANNUAL REVIEWS

To ensure that the Organization operates in a manner consistent with its status as an organization exempt from federal income tax, the Board shall authorize and oversee an annual review of the administration of this conflict of interest policy. The review may be written or oral. The review shall consider the level of compliance with the policy, the continuing suitability of the policy, and whether the policy should be modified and improved.

Minutes of a Meeting of the Board of Directors

APRIL 13, 2025
UNC PEMBROKE, PEMBROKE, NC

Pursuant to notice duly given, President Bland Simpson called a meeting of the Board of Directors of the North Caroliniana Society, Inc. to order at 9:30 a.m. on Sunday, April 13, 2025. Present in addition to the President were Vice Presidents Alice R. Cotten and Terry Roberts, Secretary-Treasurer Patrick S. Wooten, President *emeritus* James W. Clark, Jr., and the following members of the Board of Directors: Margaret D. Bauer, Tom Earnhardt, Georgann Eubanks, Emily Williamson Gangi, Rebecca Godwin, Eric L. Johnson, Leslie Dula McKesson, and C. Edward Teague III. Also present were *ex officio* directors Lisa Gregory, Interim Curator of the North Carolina Collection of the University of North Carolina Library, Darin Waters, Deputy Secretary, NC Office of Archives & History; and Vicki Rovine, Director of Carolina Public Humanities.

President Simpson welcomed those present.

On motion of Mr. Earnhardt, seconded by Ms. Godwin, the minutes of the Board of Directors meeting, held on April 24, 2024 in Chapel Hill, were approved as circulated.

On motion of Ms. Cotten, seconded by Ms. Bauer, Board actions via email on March 5, 2025, listed in [Appendix A](#), were ratified.

On motion of Mr. Teague, seconded by Mr. Johnson, the Continuing Resolutions, listed in [Appendix B](#), were approved.

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

Executive Director Cain reviewed the Society's list of active Committees and members of these committees and shared an update on current and past year grants, projects completed and those still in process.

President Simpson called on Ms. Eubanks, member of the Nominating Committee, to share an update on Members and Officers, included in [Appendix C](#).

Ms. Eubanks, member of the Nominating Committee, placed into nomination the following officers.

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

On motion of Ms. Bauer, seconded by Ms. McKesson, the slate was approved.

President Simpson called on Mr. Teague to review the grant requests received for the 2025-2026 fiscal year, listed in Appendix D, and to share a report from the Grants Review Committee. Mr. Waters, Ms. Gregory, Ms. Rovine, and Ms. Bauer shared updates from each of their organizations. Board members participated in discussion regarding the current unknowns about Federal funding and what the Society should consider in its next fiscal year budget. ExOfficio and Board members, connected to grantee organizations, were asked to leave the room for further conversation. On motion of Mr. Roberts, seconded by Ms. Gangi, the Grants Review Committee report was approved.

President Simpson called on Mr. Wooten to review the proposed budget for the 2025-2026 fiscal year, listed in Appendix E. Discussion followed and three amendments were proposed:

- USES: General/Operating Expenses: Insurance - change to \$5,000 (with Executive Committee approval for final insurance coverage proposals)
- USES: Continued Support: Teacher Retreats – change to \$42,000
- USES: Special Programs & Projects: remove Carolina Public Humanities – Mapping Project for \$28,250

On motion of Mr. Earnhardt, seconded by Mr. Roberts, the Budget, as amended, was approved.

President Simpson led a discussion on choosing the 2026 Society Award winner. Board members were asked to share names with Executive Director Cain before the October Board meeting so a decision could be made.

President Simpson shared that the fall Society Board meeting would be a two day meeting in Asheville, NC – Thursday, October 2 to Friday, October 3, 2025.

The meeting was adjourned at 12:15 p.m.

continued

APPENDIX A
NORTH CAROLINIANA SOCIETY
BOARD ACTIONS BY EMAIL
MARCH 5, 2025

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

• MARCH 5, 2025
Society Member nominees – APPROVED

Society Members (13)

- Derb S. Carter, Jr.
- Nancy Strickland Chavis
- Bart Ehrman
- Dr. Ryan E. Emanuel
- The Honorable David S. Ferriero
- Dr. Tom Hanchett
- Allen H. Johnson
- Sonny Kelly
- Dr. Alan K. Lamm
- Lenard Duane Moore
- Eleanor Spicer Rice
- Lowell McKay Whatley, Jr.
- Thea Yang

APPENDIX B
NORTH CAROLINIANA SOCIETY
CONTINUING RESOLUTION
APRIL 13, 2025

1. That the University of North Carolina Foundation Investment Fund and Wells Fargo Bank, N.A. be authorized depositories of the Society's funds;
2. That authorized access to all accounts and funds of the Society held with Wells Fargo Bank, N.A. shall require the signatures of two of the following persons: NCS Executive Director, Copie Cain (noted as Key Executive on the account), the NCS Secretary-Treasurer, Patrick Wooten, or the NCS Vice President, Alice Cotten;
3. That authorized access to all accounts and funds of the Society held at the University of North Carolina Foundation Investment Fund shall require the signatures of two of the following persons: NCS President Bland Simpson; NCS Vice President Terry Roberts; or NCS Executive Director Copie Cain;
4. That the Executive Director and the Secretary-Treasurer, in furthering the interests of the Society, be authorized to make expenditures from the Society's funds in amounts consistent with the Society's budget approved by the Board of Directors; provided, however, that expenditures in excess of that amount may be made upon approval of a majority of the Executive Committee of the Board of Directors; provided, however, that no expenditures shall contravene the internal financial control policy adopted by the NCS Board of Directors;
5. That the Archie K. Davis Fellowship Committee, appointed by the Executive Committee of the Board of Directors, be authorized to evaluate applications for Archie K. Davis Fellowships and make awards, reporting to the next meeting of the membership.

continued

APPENDIX C
NORTH CAROLINIANA SOCIETY
UPDATE: MEMBERS, BOARD AND OFFICERS

MEMBERS

NECROLOGY:

- Dr. Max R. Williams *member since 1987* (1933 – January 24, 2021)
- Ms. Leslie Anderson *member since 2016* (June 28, 1950 – December 27, 2024)
- Prof. Joseph S. Ferrell *member since 2016* (September 11, 1938 – January 29, 2025)

FEBRUARY 2025 – NEW MEMBER NOMINEES (13)
(approved by Board via email vote March 2025)

Accepted:

- Derb S. Carter, Jr.
- Bart Ehrman
- Dr. Ryan E. Emanuel
- The Honorable David S. Ferriero
- Dr. Tom Hanchett
- Allen H. Johnson
- Nancy Strickland Chavis
- Sonny Kelly
- Lenard Duane Moore
- Eleanor Spicer Rice
- Lowell McKay Whatley, Jr.
- Thea Yang

Not yet accepted:

- Dr. Alan K. Lamm

APPENDIX D

NORTH CAROLINIANA SOCIETY SUMMARY – GRANT REQUESTS RECEIVED MARCH 18, 2025

This is a list of requests received for the fiscal year ending June 30, 2026.
(Grant Request Forms for each follow this summary.)

TOTAL: \$189,376

NC Office of Archives & History (NCOAH) \$28,000

- National History Day (Federation of NC Historical Societies): \$18,000
- NC Historical Review: \$10,000

NC Collection \$73,126

Ragland payout (last year \$25,140.48)

Lacy payout (last year \$7,987.32)

- NCC Gallery Digital Exhibits: \$23,694
- H. Lee Water Photo Collection Digitization: \$25,245
- Expedited Processing of two recently acquired
NCC Photographic Collections(Bryce Lankard, Les Todd): \$24,187

Carolina Public Humanities \$78,250

- William Friday Teacher Education Initiative –
Annual William Friday Teacher Retreat (Carolina K12): \$50,000
- Mapping NC: Conversations, Community, Collaboration: \$28,250

East Carolina University \$10,000

- North Carolina Literary Review: \$10,000

Approved (April 2024) but outstanding: NC Collection – one year commitment

- Nitrate Photographic Film Scanning & Accessibility Project: \$66,667
(3 year project - \$200,000 - \$66,667/year)

continued

MINUTES

APPENDIX E
NORTH CAROLINIANA SOCIETY –
SOURCES & USES WORKSHEET
JULY 1, 2025 - JUNE 30, 2026 BUDGET

SOURCES:

SOURCES

Donations (general)	\$30,000
Publication and other	200
Annual Distribution from UNC IF	240,000

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 **\$260,200**

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	10,000
Donation & Legacy Cards	550
Annual Appeal letter	750
Bank Fees	300
Postage & Mailing	400
Post Office Box	230
Supplies	400
Google voice and mail	330
Insurance	1,250
N.C. Sec of State	60
Storage unit	2,535
Board meeting	3,430
Travel	500
Meeting – meals	300

Programs for members	
Society Awards – Imprints	7,200
Society Awards – Meetings and Celebrations	16,000
Continued Support	
Archie K Davis Fellowships	20,000
North Carolina Collection – Wilson Library (3 projects)	73,126
N.C. Historical Review	10,000
National History Day	18,000
Teacher Retreats	50,000
Book Award	900
Powell Award	200
Special Programs & Projects	
Carolina Public Humanities (Mapping Project)	28,250
NC 250th Celebrations	5,000
East Carolina University – NC Literary Review	10,000
TOTAL USES: Expenses for the year	\$325,011

Minutes of the Forty-Eighth Annual Meeting of the Membership

WEDNESDAY, APRIL 13, 2025
UNC PEMBROKE, PEMBROKE, NC

President Bland Simpson called to order the forty-eighth annual membership meeting of the North Caroliniana Society at 4:00 p.m. on Sunday, April 13, 2025.

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

Margaret Bauer, Jack Betts, Norwood Bryan, Derb Carter, Nancy Chavis, Jim Clark, Alice Cotten, Jerry Cotten, Howard Covington, Jeff Crow, Mary Virginia Spruill Currie, Julia Jones Daniels, Douglas S. Dibbert, Laurlyn Dossett, Thomas W. Earnhardt, Mary Best Ellington, Dr. Ryan E. Emanuel, Sam J. Ervin, IV, Georgann Eubanks, David Ferriero, Emily Williamson Gangi, Rebecca Godwin, Jan G. Hensley, Michael R. Hill, J. Myrick Howard, Kenneth B. Howard, Richard E. Hunter, Jr., Eric L. Johnson, Roy W. Johnson, K. Todd Johnson, Phillip J. Kirk, Jr., Jo Ann Chavis Lowery, William P. Massey, Michael McFee, Leslie Dula McKesson, Eric Medlin, Lenard Moore, Cheryl Oxford, J. Norfleet Pruden, III, Ronald David Raxter, Eleanor Spicer Rice, Terry Roberts, Thomas W. Ross, Mary Charlotte Safford, Randolph Preston Shaffner, Martin Bland Simpson III, Arwin D. Smallwood, Shelby Stephenson, Claude Edward Teague III, Thomas E. Terrell, Jr., Darin J. Waters, Joseph W. Wescott II, Willis P. Whichard, Patrick S. Wooten, Thea Yang, and David A. Zucchini.

President Simpson 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 Wednesday, April 24, 2024, were approved as previously circulated.

President Simpson recognized Georgann Eubanks, member of the Nominating Committee.

Georgann Eubanks 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: Derb S. Carter, Jr., Nancy Strickland Chavis, Dr. Ryan E. Emanuel, The Honorable David S. Ferriero, Dr.

Tom Hanchett, Allen H. Johnson, Sonny Kelly, Lenard Duane Moore, Eleanor Spicer Rice, Lowell McKay Whatley, Jr., and Thea Yang

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



Society members gathered with friends and family in Pembroke, NC on April 13, 2025 at UNC Pembroke to celebrate and honor the Society's award recipients.

Contributions

JULY 1, 2024 – JUNE 30, 2025

General Fund

- Ally Financial – Rodney Phillips
- Ann S. and F. Borden Hayes, Jr. Advised Fund of The Winston-Salem Foundation
- Anna Hayes
- Anthony Maupin, *In Memory of Armistead Jones Maupin*
- Arthur W. Cooper
- Claudia O'Hale, *In Honor of Bill & Marcie Ferris*
- Dana Borden Lacy, *In Memory of J. Haywood Davis*
- David O. Stephens Estate
- Dr. Chris E. Fonvielle, Jr., *In Memory of Dr. Keats Sparrow*
- Dr. James W. Clark, Jr., *In Honor of Copie Cain*
- Dr. Joseph W. Wescott, *In Memory of Ed Wilson*
- Doug & Debbie Dibbert
- 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 Gangi, *In Memory of Leslie Anderson*
- Eric D. Johnson, *In Memory of John L. Sanders*
- Frank G. Queen
- Fred W. Kiger, *In Memory of Fred D. & Mary W. Kiger*
- Gary Fenton Barefoot, *In Memory of George Stevenson, Jr.*
- George-Anne Willard & Matt Brown, *In Memory of William S. & Virginia W. Powell*
- Glenn Jonas
- H. Martin & Alice Lancaster
- High Point Community Foundation – Jack & Audrey Harris
- Howard Covington, *In Memory of Danny Romine Powell*
- Howard N. Lee
- Jack Betts, *In Memory of Dr. H.G. Jones*
- Jeffrey J. Crow, *In Honor of Tom Earnhardt*
- Jerry W. & Alice R. Cotten
- John Haley
- John S. May, Jr.
- John Shelton Reed, *In Memory of George Tindall*
- Jordy Whichard
- Joseph Todd Bailey
- Karen Willis Amspacher, *In Honor of Alton Balance*
- Kenneth Howard, *In Honor of Kevin Cherry*

- Lawrence S. Earley
- Margaret Bauer, *In Honor of Devra Thomas*
- Marjorie B. Buckley
- Marsha Warren, *In Memory of Paul Green*
- Martin Brinkley, *In Honor of Bland Simpson*
- Mary B. Stephens, *In Memory of David O. Stephens*
- Mary Best Ellington, *In Memory of Will Ellington*
- Mary Charlotte Safford
- Maurice C. York
- Michael McFee, *In Memory of Fred Chappell*
- Nancy Hanes White, *In Honor of Dana Borden Lacy*
- Ned Cline, *In Memory of Hodding Carter*
- Norfleet Pruden
- Norwood Bryan
- Philip Baddour, Jr., *In Honor of Margaret Baddour*
- Pickett Guthrie, *In Memory of Martha Ruth Kendall Murray*
- Randolph Shaffner, *In Memory of Archie K. Davis*
- Rebecca Godwin
- Richard Y. Stevens
- Rob Christensen
- Robert C. Allen, *In Honor of Hugh Stevens*
- Robert G. Anthony, Jr., *In Honor of James W. Clark, Jr.*
- Roger Perry
- Ron & Kathy Holland, *In Memory of Beverly C. Penkava*
- Roy W. Johnson
- Sally Dalton Robinson
- Samuel James Ervin IV
- Sarah Parker
- Sherwood H. Smith, Jr.
- Steve Cherry, *In Honor of Kevin Cherry*
- Surry Roberts
- Susan and Bill Kluttz Fund – Foundation For The Carolinas,
In Memory of Judge John Charles Martin
- Susan N. Chappell
- The Curtis Foundation
- The Mid-Atlantic Foundation – Emily & David Weil
- Thomas E. Terrell, Jr., *In Honor of Kevin Cherry*
- Thomas Ross, *In Honor of Bland Simpson*
- Thomas S. Kenan, III, *In Memory of Archie Davis Family*
and In Honor of Kevin Cherry
- Thomas W. Lambeth
- Timothy B. Burnett

continued

CONTRIBUTIONS

- Todd Johnson, *In Memory of David O. Stephens*
- Wade Smith
- William O'Brien White, Jr.
- William P. Massey, *In Honor of Bland Simpson*
- Willis P. & Leona Whichard, *In Honor of Kevin Cherry and In Memory of Janice Parker Padgett*
- Wyndham Robertson

Lacy Fund

- Bland & Ann Cary Simpson, *In Memory of Scott Lacy*
- Dana Borden Lacy, *In Memory of Dannye Romine Powell*

Davis Fund

- The Archie H. Davis Fund of The Savannah Community Foundation, *In Memory of Scott Lacy*
- Susan and Bill Kluttz Fund – Foundation For The Carolinas, *In Memory of J. Haywood Davis*

Financial Report

YEAR ENDED JUNE 30, 2025

GENERAL FUND

BEGINNING FUND BALANCE:

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

INCOME:

Contributions	54,902
Program Income	91
Interest and dividends, Wells Fargo	1
Interest and dividends, UNC Fund	48
Realized gain, UNC Fund	77,119
Unrealized gain, UNC Fund	9,876
Total income	142,037

EXPENDITURES:

Other program expenses	73,803
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ENDING FUND BALANCE:

Wells Fargo account	65,636
UNC Fund cash	36,278
UNC Fund investments	797,447
Balance at June 30, 2025	\$899,362

FINANCIAL REPORT

ARCHIE K. DAVIS FUND

BEGINNING 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

INCOME:

Contributions	575
Interest and dividends, UNC Fund	6
Realized gain, UNC Fund	68,856
Unrealized gain, UNC Fund	106,023
Total income (loss)	175,460

EXPENDITURES:

Archie K. Davis Fellowships	17,000
Carolina Public Humanities	19,900
Friday Teacher Education Initiative	21,399
North Carolina Collection	2,293
NC Literary Review	10,000
NC 250th Celebrations	500
NC Historical Review	691
Total expenditures	71,783

ENDING FUND BALANCE:

Wells Fargo account	15,000
UNC Fund cash	69,032
UNC Fund investments	1,634,725
Balance at June 30, 2025	\$1,718,756

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

Wells Fargo account	\$17,564
UNC Fund cash	77
UNC Fund investments	405,534
Balance at June 30, 2024	423,053

INCOME:

Realized gain, UNC Fund	18,265
Unrealized gain, UNC Fund	28,126
Total income (loss)	46,391

EXPENDITURES:

National History Day	17,441
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ENDING FUND BALANCE:

UNC Fund cash	18,343
UNC Fund investments	433,660
Balance at June 30, 2025	\$452,003

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

Wells Fargo account	\$43,198
UNC Fund cash	189
UNC Fund investments	994,590
Balance at June 30, 2024	1,037,977

INCOME:

Interest and dividends, UNC Fund	4
Realized gain, UNC Fund	44,800
Unrealized gain, UNC Fund	68,980
Total income (loss)	113,784

EXPENDITURES:

Friday Teacher Education Initiative	13,389
National History Day	559
Other program expenses	29,252
Total expenditures	43,200

ENDING FUND BALANCE:

UNC Fund cash	44,991
UNC Fund investments	1,063,570
Balance at June 30, 2025	\$1,108,561

FINANCIAL REPORT

WILLIAM S. POWELL FUND

BEGINNING FUND BALANCE:

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

INCOME:

Realized gain, UNC Fund	9,048
Unrealized gain, UNC Fund	13,932
Total income (loss)	22,980

EXPENDITURES:

Powell Award	200
North Carolina Collection	8,500
Total expenditures	8,700

ENDING FUND BALANCE:

UNC Fund cash	9,086
UNC Fund investments	214,810
Balance at June 30, 2025	\$223,896

ALICE AND JERRY COTTEN FUND

BEGINNING FUND BALANCE:

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

INCOME:

Realized gain, UNC Fund	4,840
Unrealized gain, UNC Fund	7,452
Total income (loss)	12,292

EXPENDITURES:

North Carolina Collection	4,654
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ENDING FUND BALANCE:

UNC Fund Cash	4,858
UNC Fund investments	114,901
Balance at June 30, 2025	\$119,759

NC SOCIETY BOOK FUND

BEGINNING FUND BALANCE:

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

INCOME:

Realized gain, UNC Fund	4,003
Unrealized gain, UNC Fund	6,163
Total income (loss)	10,166

EXPENDITURES:

North Carolina Collection	3,202
Book Award Committee expenses	647
Total expenditures	3,849

ENDING FUND BALANCE:

UNC Fund cash	4,018
UNC Fund investments	95,026
Balance at June 30, 2025	\$99,044

W. TRENT RAGLAND JR. FUND

BEGINNING FUND BALANCE:

Wells Fargo account	\$25,140
UNC Fund cash	110
UNC Fund investments	580,475
Balance at June 30, 2024	605,728

INCOME:

Realized gain, UNC Fund	26,146
Unrealized gain, UNC Fund	40,259
Total income (loss)	66,405

EXPENDITURES:

North Carolina Collection	25,140
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ENDING FUND BALANCE:

UNC Fund cash	26,256
UNC Fund investments	620,737
Balance at June 30, 2025	\$646,993

FINANCIAL REPORT

DANA BORDEN LACY FUND

BEGINNING FUND BALANCE:

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

INCOME:

Contributions	600
Realized gain, UNC Fund	8,307
Unrealized gain, UNC Fund	12,790
Total income	21,697

EXPENDITURES:

North Carolina Collection	8,787
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ENDING FUND BALANCE:

UNC Fund cash	8,342
UNC Fund investments	197,212
Balance at June 30, 2025	\$205,554

WILLIAM C. FRIDAY FUND

BEGINNING FUND BALANCE:

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

INCOME:

Realized gain, UNC Fund	7,500
Unrealized gain UNC Fund	11,548
Total income (loss)	19,048

EXPENDITURES:

Friday Teacher Education Initiative	7,211
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ENDING FUND BALANCE:

UNC Fund cash	7,531
UNC Fund investments	178,052
Balance at June 30, 2025	\$185,583

ROBERT ALLISON RAGAN FUND

BEGINNING FUND BALANCE:

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

INCOME:

Interest and dividends, UNC Fund	19
Realized gain, UNC Fund	10,926
Unrealized gain, UNC Fund	16,919
Total income (loss)	27,864

ENDING FUND BALANCE:

UNC Fund cash	11,018
UNC Fund investments	260,317
Balance at June 30, 2025	\$271,335

CASHION-STEELMAN FUND

BEGINNING FUND BALANCE:

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

INCOME:

Realized gain, UNC Fund	13,842
Unrealized gain, UNC Fund	21,313
Total income (loss)	35,155

EXPENDITURES:

N.C. Historical Review	13,309
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ENDING FUND BALANCE:

UNC Fund cash	13,900
UNC Fund investments	328,618
Balance at June 30, 2025	\$342,518

FINANCIAL REPORT

VALUE OF BANK CASH ACCOUNTS

June 30, 2025

General Fund	\$65,636
Archie K. Davis Fund	15,000
Total Bank Cash Accounts	\$80,636

VALUE OF UNC INVESTMENT FUND CASH ACCOUNTS

June 30, 2025

General Fund	\$36,278
Archie K. Davis Fund	69,032
H.G. Jones Fund	18,343
H.G. Jones Restricted Fund	44,991
William S. Powell Fund	9,086
Alice and Jerry Cotten Fund	4,858
NC Society Book Fund	4,018
W. Trent Ragland Jr. Fund	26,256
Dana B. Lacy Fund	8,342
William C. Friday Fund	7,531
Robert A. Ragan Fund	11,018
Cashion-Steelman Fund	13,900
Total UNC Investment Fund Cash Accounts	\$253,653

VALUE OF UNC INVESTMENT FUND INVESTMENTS

June 30, 2025

General Fund	\$797,447
Archie K. Davis Fund	1,634,725
H.G. Jones Fund	433,660
H.G. Jones Restricted Fund	1,063,570
William S. Powell Fund	214,810
Alice and Jerry Cotten Fund	114,901
NC Society Book Fund	95,026
W. Trent Ragland Jr. Fund	620,737
Dana B. Lacy Fund	197,212
William C. Friday Fund	178,052
Robert A. Ragan Fund	260,317
Cashion-Steelman Fund	328,618
Total UNC Investment Fund Investments	\$5,939,075

Board of Directors 2024-2025

Officers:

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

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- *Directors ex officio:* Vicki Rovine, Director, Carolina Public Humanities; Lisa Gregory, Curator, North Carolina Collection; Darin Waters, Deputy Secretary NC Office of Archives & History; Jason Tomberlin, Chair & Facilitator, Archie K. Davis Fellowship
- *President emeriti:* William S. Powell (1919-2015), Archie K. Davis (1911-1998), William C. Friday (1920-2012), Willis P. Whichard (1940-2025), and James W. Clark Jr.
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- *Secretary-Treasurers emeriti:* H.G. Jones (1924-2018) and Martin H. Brinkley
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FIRST ROW: Lisa Gregory, Terry Roberts, Vicki Rovine, Alice Cotten. *SECOND ROW:* Georgann Eubanks, Eric Johnson, Emily Gangi, Rebecca Godwin, Leslie McKesson. *THIRD ROW:* Bland Simpson, Tom Earnhardt, Darin Waters, Patrick Wooten, Jim Clark, Margaret Bauer, Ted Teague.

April 13, 2025 UNC Pembroke, Pembroke, NC.

NOTES

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