

# CAROLINA



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

FISCAL YEAR 2013

## DEVELOPMENT ANNUAL REPORT



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Development, PO Box 309,  
Chapel Hill, NC 27514-0309.  
Comments or questions:  
[development@unc.edu](mailto:development@unc.edu)  
919.962.0027.

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# BOARD OF TRUSTEES

The following is a list of UNC Board of Trustees members who served during fiscal year 2013.

Wade Hampton Hargrove (Chair)  
Barbara Rosser Hyde (Vice Chair)  
W. Lowry Caudill  
Donald Williams Curtis  
Alston Gardner  
Peter T. Grauer

H. Kel Landis III  
Will Leimenstoll (Student Body President)  
Steven Lerner  
Sallie Shuping-Russell  
John L. Townsend III  
Felicia A. Washington



## Dear Carolina Supporters,

There are many reasons why I feel privileged to be Carolina's new chancellor. One is the tremendous support this University has among alumni and friends. That support continued in fiscal year 2013. We received \$272.8 million in gifts and grants, making it one of our five best years ever. You, as our most generous donors, can claim much of the credit. Thank you.

I am still learning about our University, but I already know one thing for sure: Your support will be even more critical in the years ahead. As America's first public university, Carolina became the gold standard. The founders passed the baton, and the future is up to us. Like my predecessors, I believe that future must honor our mission of 220 years:

- to bring light "lux" and understanding to the world; and in doing that,
- to prepare each generation to thrive and have a positive impact in society, and
- to advance all humankind with discoveries and services that help the state and the nation now but also safeguard future prosperity and liberty, "libertas."

This is a grand charge and great responsibility. The good news: We start from a position of tremendous strength. Discoveries by our faculty and students touch every aspect of society, advancing human thought and improving health and the well-being of millions of people. Our faculty is dedicated to innovation and excellence in their teaching, and our staff are essential and talented partners. Our students engage in scholarship but also look outward, caring about the world. We remain one of the most accessible and affordable universities in America, thanks to the support from the state, alumni and friends. We are an indispensable part of North Carolina, providing essential services through hundreds of programs.

Looking ahead, our challenge will be unifying these strengths in an overarching strategy that will be true to our founding principles but, at the same time, fresh and forward-thinking in times of rapid change. We have started that planning process across campus. The result will underpin our next major fund-raising campaign, which will determine how far we can take our vision. I believe, with your help, we can shape the path for the great public university in America. Together, we can make history, and make a difference in the world.



CAROL L. FOLT



## A NOTE ABOUT OUR LEADERSHIP TRANSITION

I would like to extend a special "thank you" to Julia Grumbles, who served much of fiscal year 2013 as our interim vice chancellor for development. She provided outstanding leadership to our fund-raising professionals. A Carolina alumna, she also was instrumental in helping me to start my work with donors across the state and nation who are eager to invest in and support our University's future.

I am pleased to say that David Routh, another one of our alumni, has filled the post on a permanent basis. He is a veteran corporate executive with extensive connections to philanthropy at Carolina as a staff member and volunteer. David came to us from U.S. Trust/Bank of America Private Wealth Management in Raleigh, N.C., where he was managing director. He has spent the last 17 years serving individuals, families and their charitable interests, including colleges and universities, private foundations and charitable trusts.

David brings to our leadership team a unique combination of fund-raising expertise, collaborative leadership, passion and aspiration for Carolina. He already knows a great deal about our development efforts on campus, having served a stint as director of gift planning, and his deep experience in the private sector will be invaluable in leading our engagement with our alumni and friends.

## FISCAL YEAR 2013: JULY 1, 2012 – JUNE 30, 2013

- Carolina's fund-raising efforts brought in \$272.8 million in private gifts and grants, marking a top-five finish for this type of support, which is immediately available to the University.
- In commitments, Carolina secured \$284.3 million from more than 74,000 donors. Commitments include pledges as well as gifts.
- Commitments in fiscal year 2013 helped the University create seven endowed professorships, as well as a total of 84 undergraduate scholarships and graduate fellowships.

### Highlights from the year—

■ **Leonard W. Wood** contributed **\$1.4 million** to support and name The Leonard W. Wood Center for Real Estate Studies at UNC Kenan-Flagler Business School. Wood founded Wood Partners, L.L.C., of Atlanta, Ga., a national real estate company that acquires, develops, constructs and manages high-density and mixed-use properties. He earned an M.B.A. from Carolina in 1972. He received Kenan-Flagler Business School's 2008 Leadership Award for exceptional career achievement and service to the school. He serves on the center's advisory board and the business school's Board of Visitors.

■ Gifts totaling \$61,000 from 41 individual donors completed a drive to create the **James E. Holshouser Jr. Distinguished Professorship** in the UNC School of Government. Overall, the drive raised **\$370,623** from 143 individuals and organizations to endow the professorship, which honors the late North Carolina governor who also served on the UNC system's Board of Governors for more than 30 years. The professorship will enable the School of Government to seek and retain faculty committed to fulfilling its mission to provide education, advising, publications and research that help North Carolina's state and local government officials better perform the duties of public office. (See story on page 54.)

■ A five-year, **\$8 million** grant from the **Bill & Melinda Gates Foundation** to the UNC Institute for Global Health & Infectious Diseases will support efforts to improve maternal and infant health and save the lives of mothers and infants in Malawi. The grant will strengthen the Presidential Initiative on Maternal Health and Safe Motherhood, started by the Malawian government in 2010. Among the initiatives UNC will assist with is designing model maternity homes, where women who are about to deliver or who have just delivered will receive health education and services.

■ A **\$5 million** gift from the **William R. Kenan Jr. Charitable Trust** will launch an extensive renovation of Hill Hall, home of the Department of Music in the UNC College of Arts and Sciences. Work will center on improvements to Hill Hall's rotunda and 550-seat auditorium in the century-old building that originally served as the University's first library. The total cost of the project is estimated at \$15 million, with the balance coming from University funds and a special fund-raising campaign. The renovation is expected to begin in 2015 and will take two years to complete. (See story on page 25.)

■ A **\$1 million** gift from an anonymous donor honored Holden Thorp, former UNC chancellor, by establishing the Chancellor



Holden Thorp Faculty Engaged Scholars Endowment at the Carolina Center for Public Service. The endowment will support the center's Faculty Engaged Scholars program. A 1986 graduate of UNC, Thorp served as UNC's chancellor from July 2008 to June 2013.

■ Four grants totaling **\$371,000** will help the **North Carolina Botanical Garden** continue its Healing and Hope Through Science Program, which is entirely funded by grants and donations. The program brings hands-on natural science activities to pediatric patients at UNC and Duke children's hospitals. A three-year, \$200,000 grant from the Oak Foundation will provide core support for direct programming for patients and will support a new, part-time staff member. A \$121,000 grant from the Burroughs Wellcome Fund will support three years of Healing and Hope Through Science programing at the N.C. Children's Hospital, part of UNC Health Care, with a focus on developing enthusiasm and interest for science and science careers in school-aged children. A \$25,000 Ribbon of Hope grant from the North Carolina GlaxoSmithKline Foundation and a \$25,000 Sparks! Innovation Grant from the Institute for Museum and Library Services will enable the Healing and Hope Through Science program to partner with N.C. State University's College of

Design to create a sealed miniature greenhouse for gardening activities at the N.C. Children's Hospital.

■ A commitment of **\$1.2 million** over four years from **Blue Cross and Blue Shield of North Carolina** will fund a collaboration with the UNC School of Medicine to create a physician assistant master's degree program designed for returning military veterans. With input from the United States Army Special Operations Command team at Fort Bragg, N.C., the program will build on the medical experience and training that Special Forces Medical Sergeants receive during their service. The program also will improve health-care access for North Carolinians by reducing the state's shortage of health-care professionals. A significant portion of the grant will provide scholarship funds to support former Special Forces Medical Sergeants who enter the program.

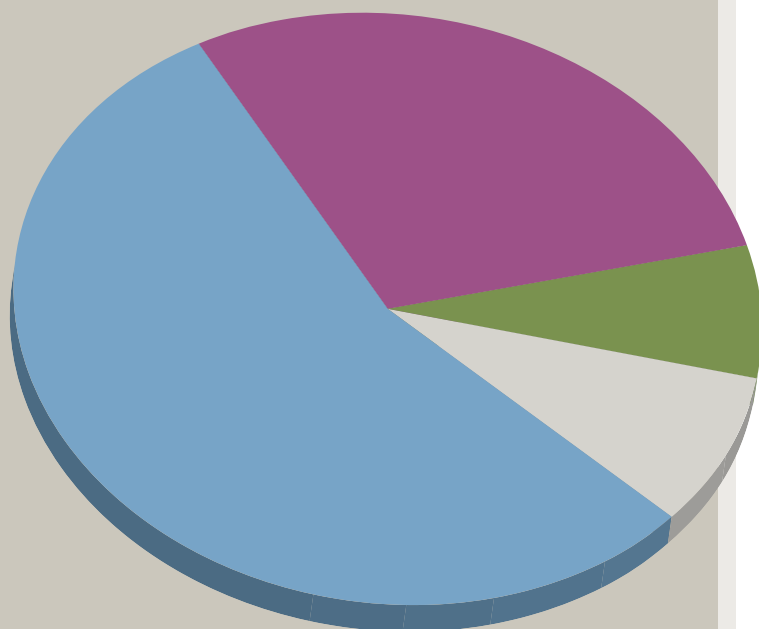


# FINANCIALS





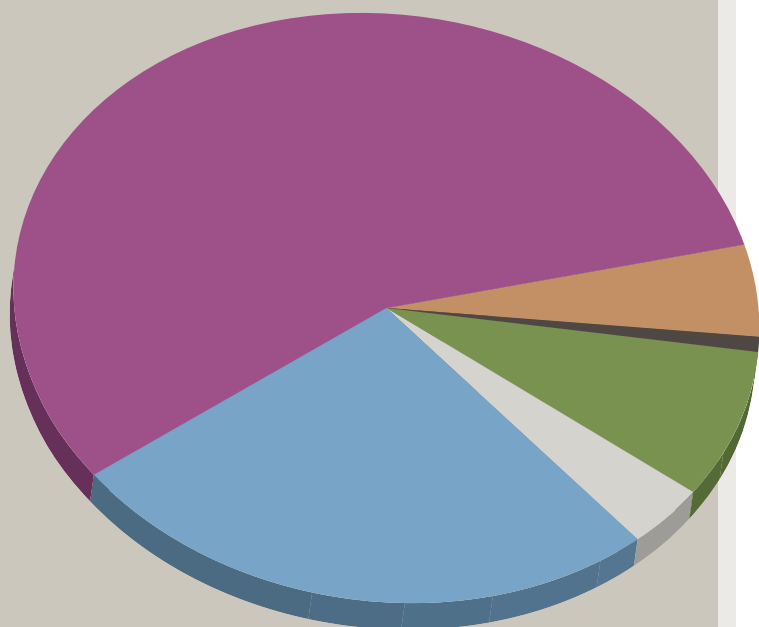
Gifts by area for FY 2013\*



- ACADEMIC AFFAIRS: \$78.8 million
- HEALTH AFFAIRS: \$151.1 million
- ATHLETICS: \$23.6 million
- OTHER: \$19.2 million

\*Rounded to nearest \$100,000

Gifts by purpose for FY 2013\*

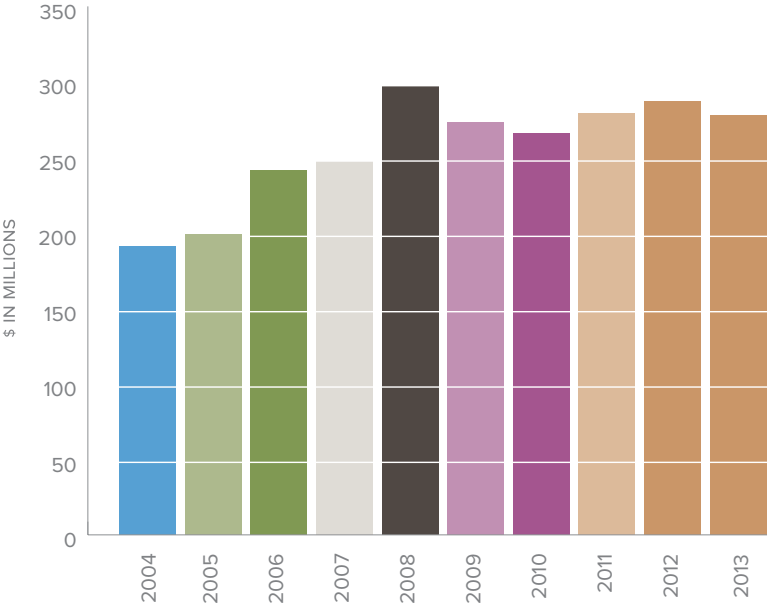


- RESEARCH: \$153.3 million
- STRATEGIC INITIATIVES: \$71.5 million
- FACULTY SUPPORT: \$10.1 million
- STUDENT SUPPORT: \$22.2 million
- CAPITAL: \$2.7 million
- OTHER: \$13 million

\*Rounded to nearest \$100,000

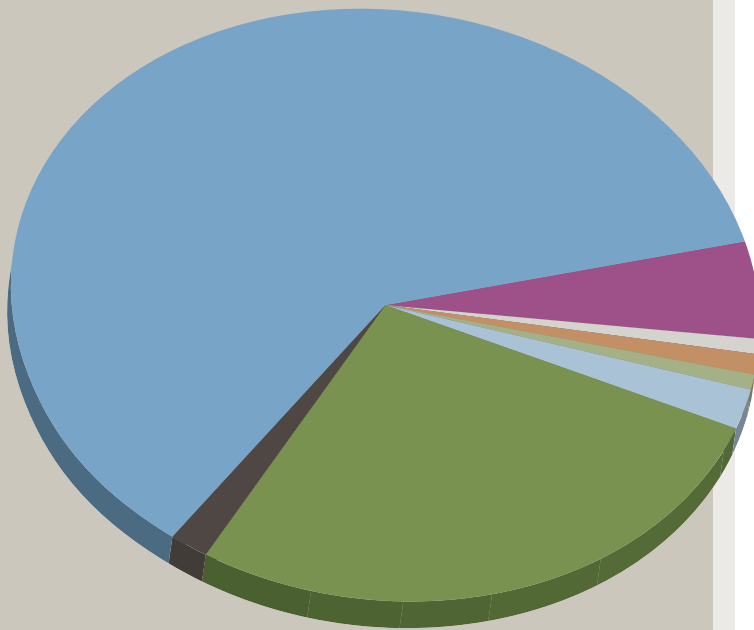


University-wide gift totals,  
FY 2004 – FY 2013





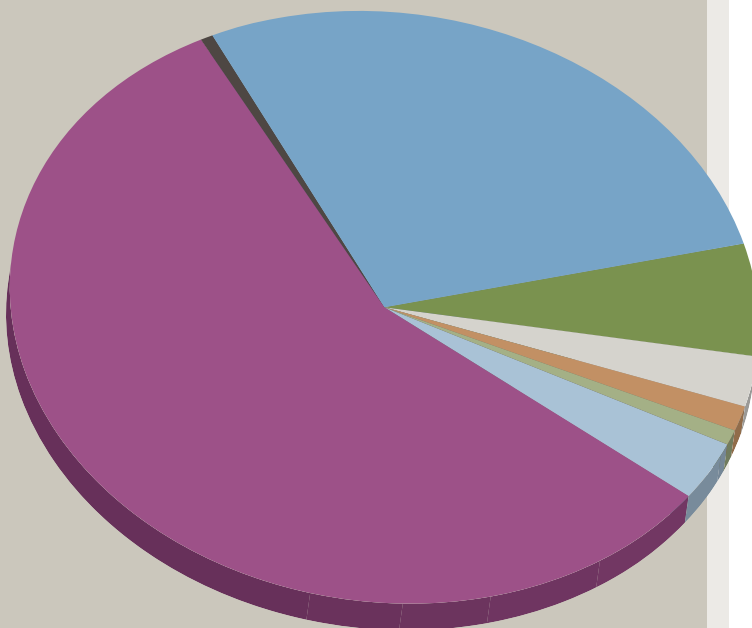
### Donors in FY 2013\*



- ALUMNI: 45,468 (61%)
- FACULTY/STAFF: 1,117 (1%)
- FRIENDS: 20,415 (27%)
- CORPORATIONS: 1,612 (2%)
- FOUNDATIONS AND TRUSTS: 696 (1%)
- OTHER ORGANIZATIONS: 730 (1%)
- STUDENTS: 674 (1%)
- PARENTS: 3,769 (5%)

\*Percentages rounded to nearest 10th

### New donors in FY 2013\*



- ALUMNI: 5,191 (28%)
- FACULTY/STAFF: 95 (1%)
- FRIENDS: 10,409 (57%)
- CORPORATIONS: 629 (3%)
- FOUNDATIONS AND TRUSTS: 168 (1%)
- OTHER ORGANIZATIONS: 239 (1%)
- STUDENTS: 518 (3%)
- PARENTS: 1,087 (6%)

\*Percentages rounded to nearest 10th



## Endowed professorships

7 professorships created in FY 2013

489 professorships total (as of June 30, 2013)

### Distribution of professorships created by FY 2013 gifts

- 2 College of Arts and Sciences
- 3 School of Medicine
- 1 School of Nursing
- 1 Gillings School of Global Public Health

In fiscal year 2013, the State of North Carolina Distinguished Professors Endowment Trust Fund provided a total of \$2 million in matching funds to boost the value of Carolina donors' contributions. The state fund, established in 1985 by the N.C. General Assembly, helps UNC system schools recruit and retain outstanding faculty.

## Scholarships/fellowships

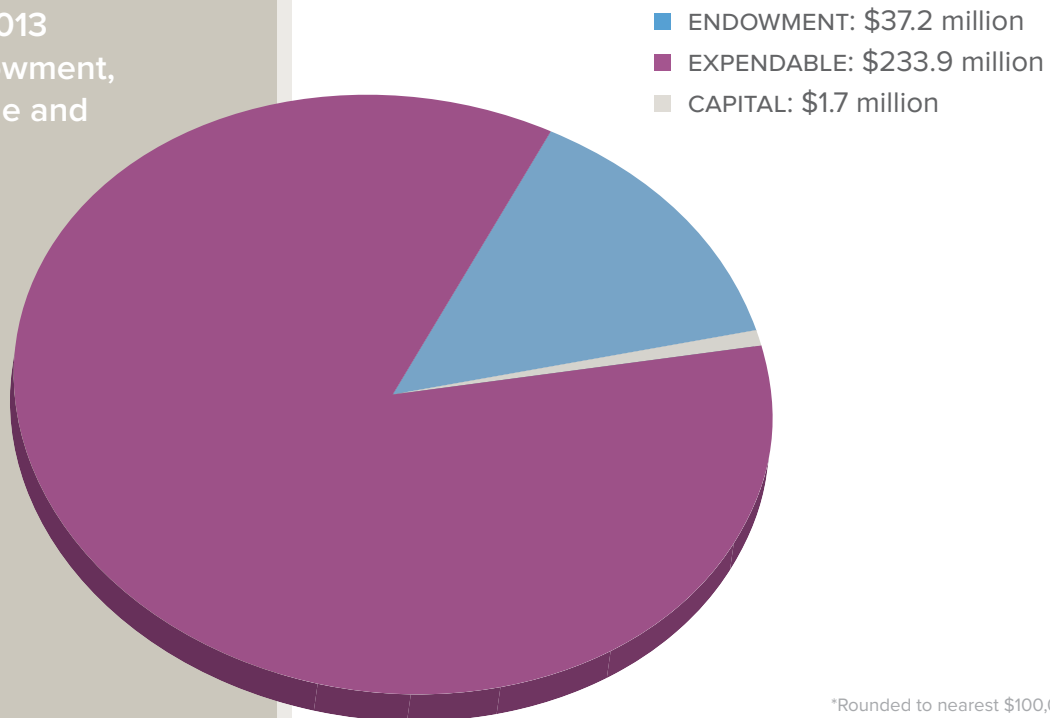
65 scholarship funds created in FY 2013

1,542 scholarship funds total (as of June 30, 2013)

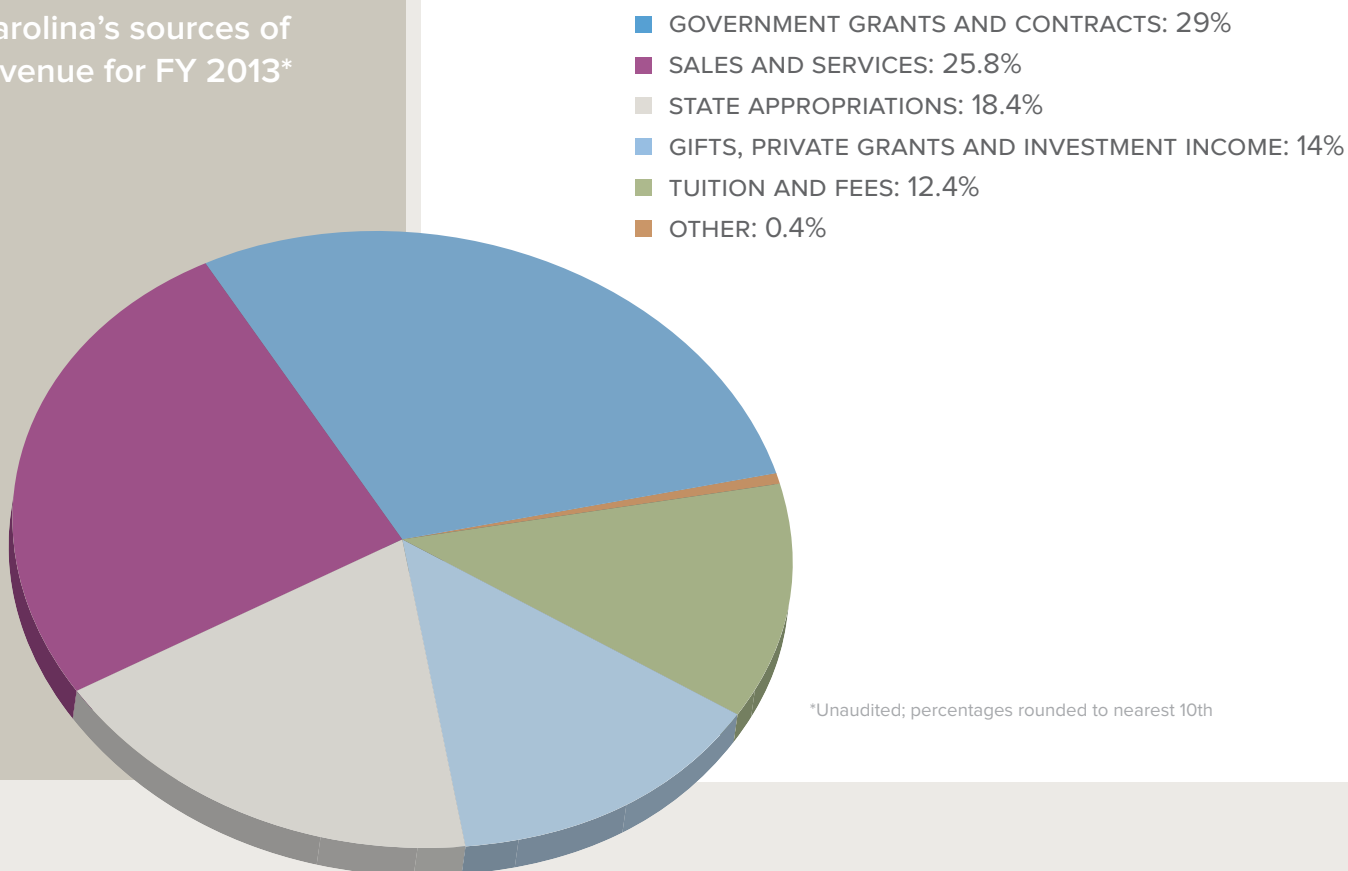
19 fellowship funds created in FY 2013

768 fellowship funds total (as of June 30, 2013)

Total FY 2013  
gifts: endowment,  
expendable and  
capital\*



Carolina's sources of  
revenue for FY 2013\*







Uday and Laura Reebye

# Uday and Laura Reebye

## GUIDING STORIES TO SUCCESS

BY HOPE BAPTISTE

Uday Nitin Reebye '04 (M.D.) always thought he would attend medical school in the northeast. It made sense, since he did his undergraduate work at the University of British Columbia in Vancouver, British Columbia, then earned his doctorate in dental medicine at Boston University.

But with the encouragement of the late Larry Keith '85 (M.S.), who among other roles served as the UNC School of Medicine's assistant dean for admissions, Uday and his wife, Laura '05, came to Chapel Hill.

"It was a wonderful opportunity that ultimately changed our lives," Uday said.

And now the Reebyes are changing lives as well through the Uday and Laura Reebye Award, which recognizes and provides financial support to a dental student who demonstrates excellence in the classroom and clinic, with preference to students who spent time shadowing Dr. Reebye or working in his office.

"I was so fortunate to receive a fellowship from the School of Medicine, so Laura and I wanted to be a part of changing the lives of students as well," he said. "We know that everyone has a story, and we want to know that story and know that we may have helped guide their path and help them succeed."

Once Uday graduated and started his oral and maxillofacial surgery practice, he and Laura became involved with the State Employees Credit Union Family House, which provides housing, healing and hope to families with an adult patient being treated for a critical illness or injury at UNC Hospitals. "This was such

a great experience for us and extremely rewarding," Laura said. "Giving our time was as critical as contributing our resources, and sometimes we couldn't tell who benefitted more, us or the families with whom we were privileged to interact."

As the founder and owner of the Triangle Implant Center, a full-service oral and maxillofacial surgery clinical practice with locations in Durham, N.C., and Mebane, N.C., Uday is all about teamwork and support. Not only do he and Laura provide financial support for students, he also offers externships in his offices so he can mentor and provide real-world experiences.

"Laura and I understand many of the situations these students often face, and we want to encourage them to continue to put in the work and it will pay off," Uday said. "We are happy to support their efforts and feel it is our responsibility to give back because the people of the state and the University invested in me, and it is simply the right thing to do."

One could argue that Uday was born with a special penchant for helping others. He is a native of the Republic of Mauritius, an island nation located off the coast of Africa in the southwest Indian Ocean. Mauritians are known for their tolerance and kindness towards all people, and when Uday's family immigrated to Canada when he was a child, then later to the U.S., he brought that philosophy with him.

And together, he and Laura are passing it on to their children—and to UNC as well. ■



Hill Hall

## KENAN TRUST GIFT OF \$5 MILLION LAUNCHES EXTENSIVE HILL HALL RENOVATION

FROM UNC NEWS SERVICES

A \$5 million gift from the William R. Kenan Jr. Charitable Trust has launched an extensive renovation of Hill Hall, home of the Department of Music.

Work will center on improvements to Hill Hall's rotunda and 550-seat auditorium in the century-old building that originally served as the University's first library. The total cost of the project is estimated at \$15 million, none of it in state-appropriated funding. In addition to the Kenan Trust's gift, the Office of the Provost will provide \$5 million, and the UNC College of Arts and Sciences will raise the remaining \$5 million in a special campaign. After a planning phase, work is expected to begin in 2015 and will take two years to complete.

"Hill Hall will become a true focal point for music on campus. The new auditorium will properly showcase the talents of our faculty and students and will be a more welcoming space for visiting artists," said Mark Katz, chair of the music department. "It's a decades-long dream come true for faculty, students and the larger Carolina community. We are so grateful to the Kenan

Trust for this gift."

Major upgrades will transform the lobby rotunda to an expanded and light-filled space suitable for receptions and intermissions. The auditorium lacks air conditioning, making it essentially unusable in the summer. That will change, with plans for a climate control system, state-of-the-art acoustical treatments, a professional-grade stage, and a piano and equipment lift.

An enhanced backstage area with updated green rooms and storage, improved lighting, piano preservation facilities, additional practice rooms, and improved administrative and teaching spaces adjacent to the rotunda will complete the renovations.

"Once again, the generosity of the Kenan Trust will transform our music facilities to benefit faculty, students and arts audiences for generations to come," said Karen M. Gil, dean of the College of Arts and Sciences.

In 2007, the Kenan Trust gave \$8 million to the music department, with \$4 million to establish 16 full music scholarships for undergraduates and \$4 million to complete

**"Once again, the generosity of the Kenan Trust will transform our music facilities to benefit faculty, students and arts audiences for generations to come."**

**—Dean Karen M. Gil**



funding for a new music building in the College of Arts and Sciences. The Kenan Music Building was dedicated in 2009. Twenty-four Kenan Music Scholarships have been awarded since the first class entered in fall 2007, elevating the department's reputation by drawing exceptional students who are as interested in a broad liberal arts education as they are in a conservatory experience (see related story at right).

"The Kenan Trust is very proud of its long association with the extraordinary Department of Music at the University of North Carolina. This gift affirms a commitment to assist in providing facilities that are commensurate with the talent of the students and the dedication of the faculty. We are also confident that the renovation of Hill Hall will provide great benefit to the University community at large," said Richard Krasno, executive director of the Kenan Trust.

The cornerstone for the original building was laid on June 1, 1907. In 1930, the music department moved to the building, which was renamed Hill Hall for alumnus and trustee John Sprunt Hill and his family, who funded renovations that included a new auditorium and organ. The Hill Hall annex, built in 1963, is not included in the renovations.

The William R. Kenan Jr. Charitable Trust was created in 1965 from the estate of alumnus William R. Kenan Jr., class of 1894. The trust and related Kenan entities and family members were the single largest donor to UNC's last major fund-raising drive, the Carolina First Campaign, committing nearly \$70 million.

The Kenan family's ties to the University date to 1790 when James Kenan, a member of the University's first Board of Trustees, contributed \$50 to the construction of Old East, the first state university building in the nation. A member of the North Carolina General Assembly, James Kenan helped draft and pass the University's charter. ■



## Ning Lee

### KENAN MUSIC SCHOLAR MASTERS HER ART, GETS DOWN TO BUSINESS

BY HOPE BAPTISTE

When UNC graduate Ning Lee was a high school senior in Singapore, she wasn't planning to major in music in college.

"I loved music, but the reality was the options for music professionals in performance, instruction or even management were fairly limited. Arts administration is also a challenging niche to try and establish oneself," Ning said.

That was a shame because Ning already was an accomplished violinist. She was concertmaster of the Singapore National Youth Orchestra and a first violinist in the Asian Youth Orchestra based in Hong Kong, with which she performed throughout Asia and Europe. She has diplomas in violin from Trinity College of Music and the Royal Schools of Music in London, and she has won certificates in the Asian Youth Music national and international competitions. ➔

Ning had applied to Carolina and some other schools but didn't consider attending UNC until the late Richard Luby, then professor and associate chair for performance in UNC's music department, encouraged her to apply for the newly established Kenan Music Scholarships.

The scholarships cover tuition, fees, room, board and lessons through a \$4 million endowment created by the William R. Kenan Jr. Charitable Trust.

When Ning came to campus to audition, she was hooked. Selected as an inaugural Kenan Music Scholar, she had no difficulty choosing UNC.

"I loved that Carolina was not a music-centric university and that it offered a broader and more holistic educational opportunity for me," she said. "It has been the best of both worlds because I have studied with renowned musicians and enjoyed the flexibility to pursue many avenues of scholarship. You can't get that at a conservatory."

What's more, Ning said the whole college environment she found in Chapel Hill inspired her to explore classes in corporate finance, Middle Eastern studies and religion as well as volunteer with the student volunteer APPLES program at the Campus Y and spend a semester abroad with UNC's Honors Semester in London.

"I am so grateful for the scholarship because it gave me the financial and psychological freedom to take advantage of everything that Carolina had to offer, and I was determined to make the most of my time here," she said. "I think that to be successful in whatever you do, you need to be diverse both in

expertise and experience. At UNC, I have been able to pursue business and music degrees, something I likely would not have been able to do elsewhere."

The significance of her scholarship is not lost on Ning. She is already giving back, starting with the Class of 2013 Senior Campaign. "I am so grateful for the relationships I have formed at UNC, the freedom to hone my art and broaden my horizons, and the support that helped me grow in so many ways," she said. "I think each of us must help continue the amazing legacy that we inherited, and it's only right to give back to a place that has given us so much."

Ning also aims to raise her alma mater's profile among international students and connect with other international alumni as well. "I think that is one thing we as international alumni should focus on because UNC is a great school, and I was fortunate enough to have someone reach out to me and encourage me to take a closer look," she said. "But Carolina should be in the conversations international students are having when they think about college, and I want to help improve its brand and appeal abroad."

Ning graduated in 2013, and took her degrees in finance and music to Fort Worth, Texas, where she is a financial analyst for American Airlines. Interestingly, her 12-member business planning team boasts seven UNC alumni, and she has already connected with the robust UNC alumni group in the area. "It's terrific that so many fellow Tar Heels are here," she said. "We can connect with each other and stay connected to Carolina as well." ■

**"It has been the best of both worlds  
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pursue many avenues of scholarship.  
You can't get that at a conservatory."**

**—Ning Lee**





Otto and Betty Woerner

## The Woerner family

### EASING FINANCIAL BURDEN FOR FAMILIES AFFECTED BY CANCER

BY CLAIRE CUSICK

Although Otto Woerner's giving was not widely known he was a philanthropist in every sense of the word. Much of the support he gave to several organizations in Burke County, N.C., was anonymous or kept quiet at his request. So was one of his final contributions, a large gift to UNC Lineberger Comprehensive Cancer Center.

Now Otto's widow, Betty Woerner, and son, Drew Woerner, are comfortable sharing the story of Otto's generosity in the hopes others will follow his wonderful example and contribute to the Betty and Otto Woerner Endowment Fund at Lineberger. The fund provides direct financial support for cancer patients and their families, helping to alleviate the many nonmedical costs that come during cancer treatment. Otto's intent was to help cancer patients at UNC Lineberger with expenses related to rent, mortgage payments, utilities and groceries and other necessary items a family might need.

Otto died in June 2013 at age 93, less than a month before his 94th birthday, "still sharp as a tack," Drew said. Otto's job with the Carolina Shoe Co. had brought him and his first wife, Wynne, Drew and daughter, Kathy, to Morganton, N.C., in the early 1960s. Otto continued with Carolina Shoe until retirement in his 70s. But he never stopped working.

According to Drew, when people asked Otto why he still worked, his standard answer was "If I don't make money, I can't give it away."

"My dad didn't want to leave huge sums to his family," Drew said. "He made sure his family was comfortable, of course. But he was very adamant that we live off of our own earnings and not off someone else's."

Cancer has had a deep effect on the Woerner family. Otto's first wife (and Drew's mother), Wynne, died of breast cancer in 2001. Drew's sister, Kathy, died from glioblastoma, a type of



According to Drew,  
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give it away.”

brain cancer, in 2011. Drew himself had bladder cancer before developing a rare form of head and neck cancer. He was treated at UNC Hospitals for the head and neck cancer and is now cancer-free. Also, Drew’s son, Tom, was treated and surgically cured for epilepsy at UNC.

“When I was getting my treatment, everyone at UNC was terrific,” Drew recalled. “The nurses are great, everyone is trained so well. Even the woman at the Lineberger Cancer registration desk remembered my name every time I came for chemo and radiation. It was just amazing.

“When my dad was looking for a place to make a major donation, he knew that both Tom and I had great experiences at UNC. He was also friends with John and Anne Wilson of Morganton, whose late daughter Katherine was treated at Lineberger. So he wanted to make his gift there. Dad was also impressed with the Comprehensive Cancer Support Program within the North Carolina Cancer Hospital and viewed it as a model in the nation. He felt they would be good stewards of his funds.”

Dr. Donald (Don) Rosenstein, director of the Comprehensive Cancer Support Program, helped set up the distribution of the fund along with the Woerners so that as many patients with demonstrated need could be assisted without a lot of red tape. The cancer support program includes patient education, counseling, nutrition, symptom management, survivorship, caregiver support and financial aid for patients. It was this last area that excited Otto Woerner, Rosenstein said, because living with cancer requires tremendous resources of all kinds.

“In addition to the physical and emotional toll it takes, cancer is among the leading causes of personal bankruptcy in this country,” Rosenstein said. “Treatment can last years. People obviously lose time off from work, and may even lose their jobs. Treatments are expensive and not all are covered.”

On top of the medical bills, there are significant personal expenditures, Rosenstein said. Patients at Lineberger come from all 100 North Carolina counties and beyond.

“The fund provides direct financial assistance to patients whose cancer care is threatened by their financial situation,” Rosenstein said. “Otto was very thoughtful about his philanthropy. It was most important to him that people who needed it had support.”

After retiring, Otto became very active in civic and community affairs in Burke County. Among his main areas of support were the Community Foundation of Burke County and the Good Samaritan Clinic, among many others.

Betty, a Morganton native, met Otto a few years ago. “When I first met him, I had no idea he was a wealthy man,” she said. “He sat in front of me at church.”

After they were married, Otto handed her the checkbook, Betty said. “He’d tell me to write a check for this, write a check for that. One of the organizations he supported here in Morganton was the Good Samaritan Clinic, and one of the checks he told me to write was to cover their payroll. A lot of these organizations relied on him. It made him happy to help people. He never wanted to be known, though.”

“We honored his request while he was alive, but now Betty and I feel that if other people were aware of this particular endowment, it might help it to grow,” Drew said. “Because of my dad’s vision, in conjunction with Lineberger’s vision, it will have a good payback in terms of investing in people.”

Together with Drew, Betty said she is telling Otto’s story so other people know about the fund at Lineberger.

“That is my hope, to honor him, to tell his story and what the fund is for,” she said. “Maybe if people knew the story, they would be willing to contribute or even establish their own fund like Otto did.”

Drew and his wife Tammy have also become members of the Lineberger Board of Visitors and enjoy learning how UNC Lineberger is fast becoming one of the best comprehensive cancer centers in the United States. Like Betty, they encourage others to participate in supporting this outstanding institution.

*The Betty and Otto Woerner Endowment Fund at UNC Lineberger Comprehensive Cancer Center welcomes donations. For information, contact Eli Jordfald at (919) 966-5905. ■*





Meredith Fish

## Afield, afar

### LEARNING HOW TO BRING CLEAN ENERGY HOME TO NORTH CAROLINA

BY HOPE BAPTISTE

UNC junior Meredith Fish came to Carolina from Kitty Hawk, N.C. That part of the Outer Banks may be most famous as the launch pad for the Wright brothers' historic first flight, but for Meredith, it and the coast's other barrier islands could also have a major stake in North Carolina's future—as sources of clean, sustainable energy.

Meredith, a mathematics and environmental sciences major, aims to harness the power of the wind and sun, and much more: She wants to help create innovative, efficient strategies to deploy these alternative energy sources in ways that will reduce dependence on fossil fuels, shrink carbon footprints and encourage communities to embrace and invest in renewable energy sooner rather than later.

“Being a part of this field experience certainly opened my eyes to the possibilities that my own path can take and to the advances that are already in place elsewhere that our country has yet to fully realize.”

—Meredith Fish

Contributed



Jessica and Tim Pate

This past summer, Meredith and 19 other students traveled to Germany, Denmark and Sweden to work with communities and leaders in the field of sustainable energy as part of a Burch Field Research Seminar on Sustainability and Environmental Planning. Led by faculty directors Greg Gangi and Elizabeth Shay of UNC's Institute for the Environment, the excursion enabled students to take two classes on sustainability and urban planning, meet with businesses and solar institute researchers, and tour active family-owned farms and small towns that have made great strides in renewable energy aptitude and application.

Lucius E. Burch III '63 made a gift in 1993 to create the Burch seminars, which combine faculty scholarship and undergraduate teaching to produce unique hands-on learning experiences in changing locations stateside and around the globe. To support the fieldwork in her seminar, Meredith received an award from the Joe Henry Jenkins and Jenny C. Jenkins Study Abroad and International Experience Fund and the Timothy and Jessica Hope Pate Environmental Science Field Program Scholarship Fund (see related story at right). These funds, created by private donors to the University, provide resources for study abroad and field research opportunities that might not otherwise be available to a broad range of students.

For Meredith, the second of three Fish siblings now at UNC, the assistance freed her to take full advantage of the six weeks she was abroad to explore the energy industry from research, business and deployment perspectives, as well as learn more about career opportunities in emerging specialty areas.

"Being a part of this field experience certainly opened my eyes to the possibilities that my own path can take and to the advances that are already in place elsewhere that our country has yet to fully realize," Meredith said. "It has also challenged me to think more critically about energy use and conservation, from taking public transportation and conserving water resources to using less air conditioning and turning off lights. Learning firsthand how alternative, renewable energy is generated, distributed and utilized successfully in other countries informs my research and will shape my future."

Gangi, associate director for education and clinical assistant professor in the Institute for the Environment, agrees. "Real-world experiences like these field research seminars give such dimension to the scholarship we as faculty members pursue in the classroom, and inspire students to ask, and seek answers to, really hard questions," Gangi said. "For Meredith, I think this experience not only introduced her to institutions that are driving innovation in the field of renewable energy, but also enlightened her to the significant opportunities for her personal growth and career trajectory. The impact is tremendous on our students and faculty as well as the communities we ultimately serve."

Meredith said her experience reinforced the importance of a global education. "The world is much smaller now because of technology and interdependent economies, among other things," she said. "If researchers, educators and policy makers are going to make a valuable contribution with a significant impact, we have to think globally and act locally." ■

## Tim Pate

### FIELDING A DAUGHTER'S REQUEST

BY LAURA ERTEL

*Editor's note: This story originally appeared in the Institute for the Environment's Fall 2012 newsletter, UNC Environment, and is reprinted with permission.*

Four generations of Pates have attended Carolina. The latest to carry on the family's Tar Heel tradition is Jessica Pate, who earned her undergraduate degree in environmental science in 2007.

At Carolina, Jessica took advantage of several field study opportunities, assisting in marine conservation research in Mexico, exploring how elephants affect woodlands in Kenya and studying coral reef ecology in the Virgin Islands with her academic advisor, Institute for the Environment (IE) Associate Director for Education Greg Gangi. The experiences ignited Jessica's passion for marine biology and led her to study sea turtles in Costa Rica, Africa and Florida after graduation.

So when Jessica's father, Tim Pate, retired to Chapel Hill in 2011 and was looking for a way to give back to





the University, the 1980 graduate (business administration) was encouraged by his daughter to do something for UNC's environmental programs.

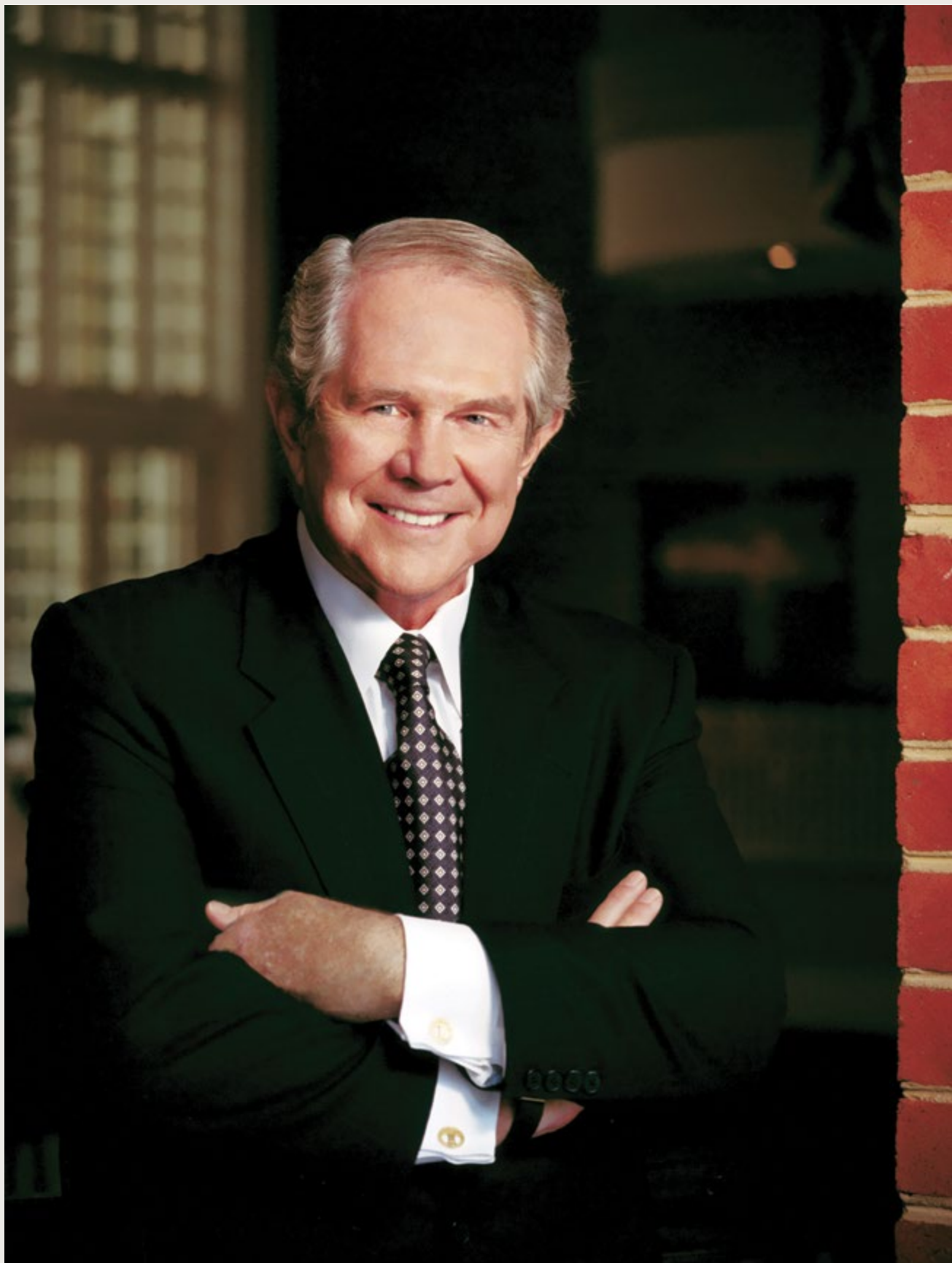
"Dr. Gangi was always encouraging me and other students to take field classes and to study abroad. Those programs made a huge impact on my life: They led me to the career I've chosen," said Jessica, who is now pursuing a master's degree in marine biology at Florida Atlantic University. "Participating in those programs can be expensive, and we wanted to help students who might not otherwise be able to afford it to have that experience."

After talking with Gangi and then-IE Development Director David Greer, Tim and Jessica decided to establish a scholarship fund to provide support for UNC students to participate in field learning and research at the IE's field sites in Thailand, the Galapagos Islands, the United Kingdom and in several regions of North Carolina.

"Once Greg told us that there were students who wanted to participate in the field studies programs but couldn't afford to, the thought of helping them really appealed to us," Tim said.

He also saw this gift as an opportunity to start his daughter on a course of philanthropy at an early age. "As a father, I felt this was a way to teach my child to start thinking about what she wanted to support, and who it was going to help."

The Pates' generosity will definitely help many Carolina students, said Gangi, who leads a committee that awards these scholarships, focusing first on need, then merit. "We are grateful to the Pates for providing this generous gift. It is tremendously affirming to know that Jessica and Tim found so much value in Jessica's environmental education at Carolina that they want to make similar experiences possible for other students who may not have the financial means to participate otherwise. We are committed to ensuring that students have access to experiential education, because those experiences have such a positive impact on their personal development and career opportunities." ■



Contributed

Pat Robertson



# GRATEFUL PATIENT PAT ROBERTSON COMMITTS \$500,000 TO UNC SCHOOL OF MEDICINE

BY BRENDA DENZLER

Pat Robertson is used to receiving messages from above. But never had guidance come from a surgical equipment salesman flying at 30,000 feet.

In 2004, Robertson, founder of the Christian Broadcasting Network, was diagnosed with atrial fibrillation. “It’s a terrible thing, when it comes upon you,” Robertson said. “You’re very short of breath, and it just saps the life out of you.”

Atrial fibrillation, also known as a-fib, is caused by errant electrical signals in the heart that disrupt its normal rhythm and diminish blood flow. It’s the most common form of irregular heartbeat, causing extreme fatigue, shortness of breath and an increased risk of stroke.

Robertson tried several medications, but they all eventually failed him. Then his doctors tried cardiac ablation and, when that also failed, they tried shocking his heart back into the proper rhythm.

“I wound up having this procedure done seven or eight times,” he said. “I was there so often, the folks in the hospital began calling the machine the Pat-Zapper.”

That’s when he received the life-changing message from above.

“A friend of mine happened to sit next to a surgical equipment salesman on an airplane,” Robertson said. “He told my friend about this surgeon in North Carolina who had just invented a procedure to correct a-fib. My friend urged me to call the surgeon, and that’s how I met Andy Kiser.”

For years, the last-ditch treatment for a-fib has been a complicated open chest operation. In 2009, Kiser—now chief of cardiothoracic surgery at the UNC School of Medicine—developed a minimally invasive procedure that incorporated the skills of a cardiologist as well. The result, the Convergent Procedure, has a 70- to 80-percent success rate. Pat Robertson was one of the successes: After a nine-year battle, his a-fib is now easily controlled with minimal medication.

To Kiser, collaboration is the key—in almost every area of life.

“Until we started doing this,” Kiser said, “cardiothoracic surgeons and cardiologists really didn’t work together. But today, we’re doing all kinds of things as a team. And that approach is getting results.”

Kiser is now being approached by industry people with new products and new devices that they want UNC to devise physician-training modules for or to test. In 2011, he brokered a

“This isn’t about going to the operating room, doing cases and making a lot of money. ...We have to fund medical education, and we can’t do that alone. We must collaborate. We must have partners.”

—Dr. Andy Kiser

five-year partnership with KARL STORZ Endoscopy to establish a KARL STORZ Center of Excellence at the School of Medicine. The center, which uses the company’s technology for training and development, will be operational this fall. Kiser sees it as a model of collaboration.

“Surgeons have to learn new skills all the time, especially as medical technology advances,” he said. “Companies developing a new device want to make sure that their technologies are used correctly and that patients have good outcomes. A great way to do that is to educate surgeons in a simulation environment like our center and show them how to do it correctly.”

The point of all this? Medical education and training that will translate into improved outcomes for patients.

“This isn’t about going to the operating room, doing cases and making a lot of money that goes into our pockets,” Kiser said. “It’s bigger than that. We have to fund medical education, and we cannot do that alone. We must collaborate. We must have partners.”

So far, Kiser’s training and testing work has raised nearly \$100,000 for the School of Medicine, not to mention an unrestricted \$500,000 commitment in May 2013 from Robertson, whose new lease on life has made him a very grateful patient.

“These collaborations,” Kiser observed, “present a world of opportunity for doing good.” ■



Stephen Cumbie



Leo Horey III

## Stephen Cumbie and Leo Horey III

### GETTING DOWN TO THE BUSINESS OF GIVING BACK

BY HOPE BAPTISTE

Stephen M. Cumbie '71, '73 (M.B.A.) and Leo S. Horey III '90 (M.B.A.) may have earned masters degrees from Kenan-Flagler Business School nearly two decades apart, but their college careers were a lot alike.

They both focused on real estate studies and have enjoyed successful careers in commercial real estate. Cumbie is president, CEO and principal of NVCommercial Incorporated, NVRetail and the Metro Realty group, commercial real estate investment, development and services companies in the Washington, D.C., and Denver, Col., metro areas. Horey is executive vice president and chief administrative officer of AvalonBay Communities Inc., which focuses on developing, redeveloping, acquiring and managing high-quality apartment communities in high barrier-to-entry markets of the United States.

Both men live in Virginia, and both credit their Kenan-Flagler experience for giving them the skills and expertise to pursue their ambitions and succeed. "Getting my M.B.A. at UNC opened many doors for me and put me on a career path that I wouldn't have otherwise had the opportunity to pursue," Cumbie said. "The curriculum was so challenging yet so stimulating that it motivated me all the more to take ownership of my education and my future and make the most of the opportunity."

For Horey, an M.B.A. from Kenan-Flagler spelled more than just opportunity; it was the catalyst for some of his most meaningful and lasting relationships. "When I came to UNC, I was fortunate to become associated with some amazingly supportive and generous people who made my educational

experience something truly special," Horey said. "I have enormous respect and appreciation for so many of the professors and professionals who helped shape my life after graduation, and as a result, I maintain a close connection to Carolina."

Now, both men are also giving back to Kenan-Flagler through student fellowships in an effort to make sure future M.B.A. students who aspire to careers in the real estate industry can pursue those ambitions. Cumbie created the Stephen M. Cumbie M.B.A. Fellowship for Real Estate Students because he, along with his wife Dr. Druscilla French '71, '78 (M.A.), wanted to encourage more women to enter the field.

"Though much has changed over time, the real estate industry continues to be a province of men," Cumbie said. "We wanted to help facilitate a better gender balance in the profession and also support the business school's efforts to recruit and enroll those highly sought-after students in a fiercely competitive environment."

Horey and his wife, Bethann, created the Horey Family M.B.A. Fellowship to give back in a tangible and meaningful way and to express his gratitude for the prestigious Richard H. Jenrette M.B.A. Fellowship he received as a student. "I feel fortunate to be in a position to assist future students get a top-notch business education at UNC, and I understand and applaud the mission of higher education," Horey said. "Everyone here was so generous and genuinely interested in helping me succeed during my time here, and it's important to both of us to continue that. It's an investment we are honored to make."



In addition to their financial support, Cumbie and Horey give their time to UNC. Cumbie served as the executive director of the Leonard W. Wood Center for Real Estate Studies (formerly the Center for Real Estate Development) at Kenan-Flagler and has been an executive in residence and an adjunct professor. Horey serves on the Kenan-Flagler Board of Visitors as well as the Wood Center for Real Estate Studies board.

*For more information or to make a gift, please contact Adam Gerds, executive director of development for Kenan-Flagler Business School, at (919) 962-9143 or [adam\\_gerds@unc.edu](mailto:adam_gerds@unc.edu). ■*



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Elizabeth North Lee

## Jay Sumner and Liz Lee

### CREATING A JOINT LEGACY TO HONOR A LOVED ONE

BY CLAIRE CUSICK

**“...I wanted to provide a future for someone who was like Elizabeth.”**

—Jay Sumner

Jay Sumner and his mother-in-law, Liz Lee, have combined efforts to honor their beloved, Elizabeth North Lee '91, who died of breast cancer in January 2012.

Liz, of State College, Pa., described her daughter as a lifelong Carolina fan. Her late husband, James Lee, was from Mebane, N.C., and graduated from UNC in 1963. “He was crazy about UNC,” Liz said. “Elizabeth was a huge fan, too. He instilled it in her early on. She loved sports, especially UNC.”

James, who worked in the U.S. Foreign Service, died when Elizabeth was just 10. But she still visited her father’s relatives in Mebane, and when it was time to choose a college, there was only one choice for Elizabeth, even though she lived in Virginia.

“Elizabeth knew her college choice while in middle school,” Liz said. “It was always UNC, and I think a lot of it had to do with her dad and her visits to North Carolina. She went to a small high school, but she said she was ready for the big time.”

Elizabeth’s years at Carolina were some of the happiest of her life, Liz said, and the most productive.

Jay, who lives in Arlington, Va., didn’t meet Elizabeth until well after she graduated, but she told him about Chapel Hill, including the great biscuits at Time-Out. Initially intending to follow in her father’s career footsteps, Elizabeth majored in Russian and Eastern European Studies. She became an immigration officer with the U.S. Immigration and Customs Enforcement Agency.

“She served as a branch chief for the asylum division, and before that ran the field office in Albuquerque,” Jay said. “She was once in charge of the Cuban refugee program, then Africa and the Middle East. She traveled a lot for work, and we traveled together. I think she fulfilled the goal she had when she went to Carolina.”

After she died, Jay and Liz decided to do something that would help someone like Elizabeth—an out-of-state student who really wanted to attend Carolina, but who might not be able to afford out-of-state tuition. So they created a joint bequest to fund the Elizabeth North Lee Scholarship, to benefit students from Virginia who wish to attend Carolina.

“I was a single mother when she was applying to college,” Liz said. “I didn’t know much about scholarships. I would love for folks out of state to get the experience and the education that Elizabeth got, and if they really want to attend Carolina, not to be put off by the money.”

“I wanted to do something that could help someone who was like her,” Jay said. “If, because of out-of-state tuition, someone couldn’t otherwise go to UNC, I wanted to provide a future for someone who was like Elizabeth.” ■



From left to right: Mike Smith, Jim Hunt, Jim Holshouser and Jim Martin

## New distinguished professorship honors Jim Holshouser

More than 150 friends and three former governors gathered in December 2012 at the UNC School of Government to celebrate the creation of the new James E. Holshouser Jr. Distinguished Professorship. Former North Carolina governors Holshouser, Jim Hunt and Jim Martin were present at the announcement of the new endowment, which honors Holshouser's lifelong dedication to fair and effective government. He died in June 2013 after several months of declining health. He was 78.

The School of Government provides education, advising, publications and research that help North Carolina's state and local government officials better perform the duties of public office. In the tradition of Gov. Holshouser, the endowed chair will enable the school to seek and retain faculty who will bring intelligence, creativity and deep commitment to serving North Carolina's public officials.

"There is not a person in North Carolina who is respected more for his commitment to the state," said Mike Smith, dean of the School of Government. "Having the Holshouser name on this professorship sets the bar high, and over the

years it will inspire people who know his work and who come to know what he has represented to the state. It will inspire us to continue to do our work along that same path, helping people in fair, non-partisan ways that are practical for public officials in the state."

In 1972, James E. Holshouser, Jr. became one of the state's youngest governors and the first Republican elected in the 20th century. As governor, he was widely—and highly—regarded for a number of economic improvements and education initiatives, including a major restructuring of the state's system of higher education and the enrollment of children statewide in kindergarten as their first year of public schooling.

The new professorship will receive matching funds from the State of North Carolina Distinguished Professors Endowment Trust Fund established by the N.C. General Assembly in 1985. Gifts to the Holshouser Distinguished Professorship can be made online at [www.sog.unc.edu/node/1841](http://www.sog.unc.edu/node/1841). ■



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