2021-2022

Longwood University



GREETINGS FROM

Foundation President Robert S. Wertz, Jr. and CEO, Burt Hazelwood

Thank you for your support of the Longwood University Foundation. As we write this message, U.S. News and World Report issued its annual best colleges rankings validating the wise investment in a Longwood education, with Longwood moving up to #5 in the Top Public Universities in the South category. Since its establishment in 1959, the Longwood University Foundation has assisted in stewarding private gifts to support students, faculty, and programs for Longwood. 2021 was another exceptional year for the Longwood University Foundation as we continued to operate through the pandemic. Dedicated staff and devoted volunteer Board members worked on a number of strategic initiatives positioning the Foundation for growth.

We thank immediate past President, Joseph C. McPhail, III, for his focus on strategic planning and risk management. The Foundation's three major standing committees: Stewardship and Student Success, Finance and Investment, and Governance have in place a process to regularly review risks to the Foundation, its assets, and its operations, and meet regularly to accomplish our mission of stewarding scholarship and programmatic funding to benefit Longwood according to donor wishes. The Foundation works to strengthen its partnership with the University by maximizing scholarship dollars, through its collaboration with Advancement, Admissions, Finance, and the Registrar, and accelerating its distribution of programmatic support funds to the University.

While market forces of late haven't been as favorable, the Foundation ended 2021 up \$14.7 million, with \$116 million in total assets. For academic year 21-22, the scholarship and programmatic support were \$2.23 million and \$733,000, respectively. 704 students and multiple Longwood programs benefited from the contributions of generous donors made over the last 60 years.

You too can help these efforts. A description of Longwood's Giving Societies as well as the variety of ways to give to Longwood is contained in this year's report. We couldn't do this important and rewarding work without our generous donors, exceptional staff, and dedicated Board members and University partners. On behalf of the Foundation, thank you for your investment in Longwood and its students.

Robert S. Wertz, Jr. Foundation President 1. Boar HAZELWOO.

T. Burt Hazelwood, CPA CEO

Table of Contents

ABOUT LUF	04
TIMELINE OF AN ENDOWED GIFT	06
DONOR HIGHLIGHT	08
GIVING SOCIETIES	11
WAYS TO MAKE AN IMPACT	12
SCHOLARSHIPS BY THE NUMBERS	14
ENDOWED SCHOLARSHIPS	16
ENDOWED PROGRAMS	21
PROGRAM HIGHLIGHT	22
FINANCIAL OVERVIEW	24
BOARD OF DIRECTORS	28
STAFF	31

2 LONGWOOD UNIVERSITY FOUNDATION FOUNDATION 3





STUDENT IMPACT

66

Longwood has broadened my horizons and brought me out of my comfort zone."

TAMIA DANIEL

Class of 2023 Elementary Education Chesterfield, Virginia

Dr. Edna Allen Dean Scholarship, Hull Education Scholarship, Mildred Davis House Scholarship, Virginia Blanton Hanbury Scholarship

Timeline of an Endowed Gift

Donors can elect to give an operating gift above and beyond their endowment pledge, allowing the endowment to be awarded prior to maturity thus providing an immediate impact.

01

A Longwood University Gift Officer works with a potential Donor to identify their passion and assist them in making the decision to invest in Longwood by establishing an endowed scholarship or program gift through the Longwood University Foundation.

03

The Donor fulfills the pledge established in the Statement of Intent in a lump sum or over a period of 1 to 5 years to reach the minimum endowment level.

02

The Donor and Gift Officer finalize details about the endowment, which results in the Endowment Agreement and Statement of Intent. Important details include determining the name of the endowment, the criteria for awarding, the type of gift establishing the endowment, and the pledge schedule to fund the endowment. Endowments can be established through the gift of cash, investments, retirement plans, life insurance, or bequests.

04

Once the Donor fulfills the minimum endowment requirement, the endowment enters a maturation period. This maturation period allows the endowment to grow prior to its first distribution.



The Donor's endowed gift

for generations to come!

benefits Longwood University

05

At the conclusion of the maturation period, the endowment is ready for annual distribution of awards based on a percentage set by the Longwood University Foundation's Board of Directors.

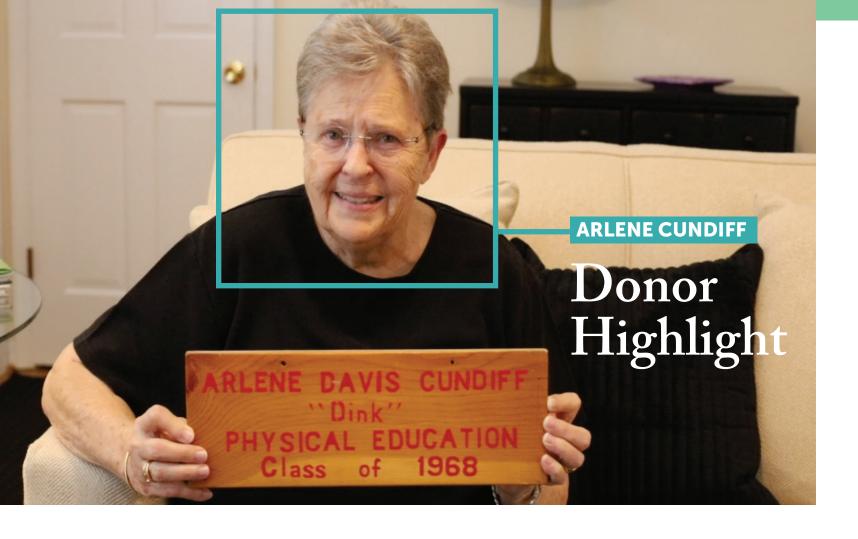
To smooth out market volatility, the distribution is calculated based on a prescribed quarterly average.

ution is calculated bas bed quarterly average.

06

Each year the Longwood University Foundation keeps Donors updated with a report outlining endowment performance and any scholarship recipient information.

6 LONGWOOD UNIVERSITY FOUNDATION



Arlene Cundiff '68 shares how she has been able to give back to Longwood, the alma mater that developed her confidence and teaching skills.

In the mid-60's, Arlene Cundiff dropped out of college after two years at a junior college. Arlene began working as a secretary for Burlington Industries and, after a few years, was offered a promotion as the secretary for the plant manager. Excited by the offer and the potential for growth at the company, Arlene inquired about what would be next after that position. When she learned that the position would be the end of her advancement opportunities, she decided to go back to school. "Longwood was, for me, the perfect solution," Arlene states of her decision to enroll in the teaching program at Longwood.

Arlene was welcomed as an older student by Longwood, an all-girls college at the time, which instilled in her a level of confidence that she has carried with her throughout her entire lifetime. Arlene enjoyed the smaller classes and the welcoming staff and faculty. Longwood offered her the camaraderie and immediate feeling of "home." She describes it simply, "It was my home and that was my family."

Arlene graduated in 1968 and was able to secure a good teaching job due to Longwood's "phenomenal reputation." Arlene remained in the field of education throughout her career, eventually retiring from Virginia's Department



It's just the ability of that scholarship being able to make a little bit of difference in somebody's life and being able to help somebody get to the point they can achieve their goals — it's a good feeling." ARLENE CUNDIFF '68

of Education. Although she regularly contributed to Longwood through the years, she remembers doubting she would be in a position to establish a scholarship; however, Longwood's Gift Officers were able to show her how she could donate over a period of time. In addition to giving to the scholarship, Arlene convinced all her friends, her sisters, and anybody who was wanting to buy her a birthday present or a Christmas gift to send a check to Longwood for her scholarship.

Arlene hopes her scholarship will provide opportunities to Longwood students who might feel like limited opportunities exist for them. While at Longwood, Arlene played intercollegiate sports and remembers the camaraderie of riding the Longwood bus with her brown bag lunch packed by the dining hall and how the opportunity expanded her world. She hopes that she can make an impact in somebody's life.

Since 2018 the Arlene D. Cundiff Scholarship has provided scholarships to female student athletes from Virginia. Having met her scholarship recipients, Arlene says, "It's just the ability of that scholarship being able to make a little bit of difference in somebody's life and being able to help somebody get to the point they can achieve their goals - it's a good feeling."

When asked about the importance of giving and supporting opportunities for Longwood students, Arlene says, "I think giving back is so important ... I love Longwood. Longwood was probably the best thing in my life. It gave me focus. It gave me a family. It gave me a history. All the memories and all of the good times and all of the good people. I made a lot of good friends along the way and I'm ready to go back to Longwood anytime they need help. It's a good place to be."



Arlene Cundiff
'68 enjoys time
with friends
and returning
to campus for
Longwood
University's
Scholarship Dinner.



Giving Societies

LIFETIME GIVING

Rotunda Society

The Rotunda Society recognizes donors who have made significant and lifechanging cumulative contributions in excess of \$250,000 to support the growth and sustainability of Longwood University. Their leadership in giving supports infrastructure projects, major initiatives, countless scholarships, and program funding for the Foundation's growing endowment.

PLANNED GIVING

1839 Society

The 1839 Society recognizes donors who have made a planned gift to Longwood University to be realized beyond their lifetime. Members of this society recognize the role of philanthropy in the health of an institution and want to ensure Longwood's sustainability. These gifts leave a legacy at Longwood and enable future generations to benefit from the donor's thoughtful and selfless giving. Members of the 1839 Society are celebrated today for the impact of their future gifts.

ANNUAL GIVING



Citizen Leader Society

Citizen leaders are the bedrock of democracy allowing communities to thrive as they make positive contributions to the common good. Members of the Citizen Leader Society take the lead among Longwood University's most influential annual supporters with their generous gifts beginning at \$1,500. For graduates of the last decade, "Young Alumni," a minimum of \$500 in total annual giving qualifies them for membership. This support provides crucial resources and immediate support, serving as a vital part of what Longwood achieves every day.

LOYAL GIVING

Pillar Society



Like the well-known ionic columns that adorn many of Longwood University's gorgeous buildings, members of the Pillar Society provide the necessary and fundamental support Longwood needs to meet its mission. Members of the Pillar Society are recognized for their loyal giving for consecutive years. Loyal giving is a pillar to our institution and provides the stability Longwood students need to create a better and brighter tomorrow.

RECURRING GIVING

Fountain Society FOUNTAIN



The Fountain Society recognizes and celebrates donors who give at least \$5 a month to Longwood University. Monthly giving provides a constant flow of support to the areas that need it most. Much like the water that flows from Longwood's iconic fountains, monthly giving sustains and aids in the everyday development of citizen leaders.



Estate gifts are a great way to enhance your Longwood legacy by adding to your current scholarship or creating a new scholarship. Consider the following:

Bequest

Designate Longwood as the beneficiary of your asset by will, trust or beneficiary designation form.

IRA Rollover

Congress has enacted a permanent IRA charitable rollover. As a result you can make an IRA rollover gift this year and in future years.

Required Minimum Distribution (RMD)

Consider gifting part or all of your RMD if you are at least 72 or older. Utilizing the IRA rollover may also satisfy your required RMD for the year.

Beneficiary Designation Gifts

Designate Longwood as a beneficiary of a retirement, investment or bank account or your life insurance policy.

Charitable Gift Annuity

Transfer your cash or appreciated property to Longwood in exchange for our promise to pay you fixed payments (with rates based on your age) for the rest of your life.

Donor Advised Funds

Create a DAF and make charitable gift recommendations during your lifetime. When you pass away, your children can carry on your legacy of giving.



Longwood has given me a wonderful support system of professors, mentors, and friends who encourage me to learn and grow through new experiences."



AUSTIN OVERSTREET

Class of 2024
Visual & Performing
Arts - Music
Franklin, Virginia
Hull Music Scholarship

Hull Music Scholarship

/ Longwood University

DMV Scholarship

/ Waverly M. Cole

Scholarship Fund

12 LONGWOOD UNIVERSITY FOUNDATION FOUNDATION

Scholarships by the Numbers

ACADEMIC YEAR (AY) 2021-2022

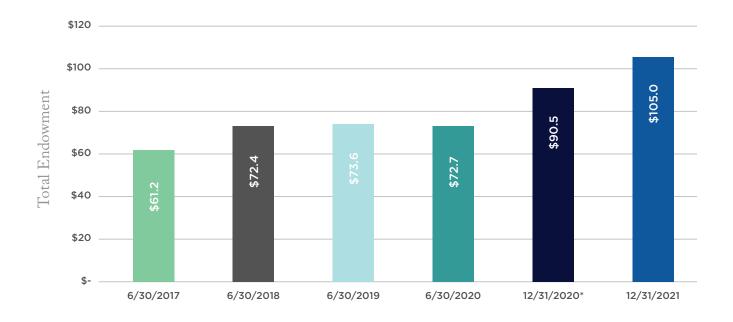
912
SCHOLARSHIPS

448 FUNDS

704
STUDENTS

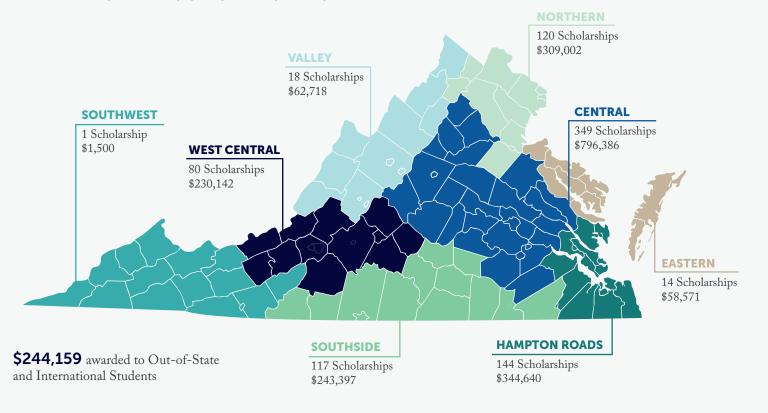
\$2,297,668
IN SCHOLARSHIPS

ENDOWED NET ASSETS \$ in millions



*12/31/2020 is a six month stub period. As of 12/31/2020 the Foundation changed its fiscal year to calendar year.

IN-STATE SCHOLARSHIPS



SCHOLARSHIPS BY CLASS

Freshmen:	211 Students	266 Scholarships	\$629,903
Sophomore:	94 Students	117 Scholarships	\$344,592
Junior:	107 Students	136 Scholarships	\$401,944
Senior:	264 Students	357 Scholarships	\$832,199
Graduate:	26 Students	34 Scholarships	\$86,998
Non-Degree:	2 Students	2 Scholarships	\$2,032

3.214

AVERAGE GPA
of Scholarship Recipients

FORECAST OF 2022-23 SCHOLARSHIPS

\$2.6 million

LONGWOOD UNIVERSITY FOUNDATION

FOUNDATION REPORT

Endowed Scholarships

Scholarships help students with the costs of college and are awarded based upon the intent of each donor – all scholarships impact students, whether that impact is making college financially possible or recognizing their hard work and achievements.

A Grateful Alumna 3 Scholarship James Thomas Butler, Jr. Scholarship Walter & Anne Ayers Butler Scholarship for The Citizen Scholars A Grateful Alumna 2 Scholarship A Grateful Alumna 1 Scholarship Honors Program Charlotte Campbell Scholarship Shane Adcock Scholarship Camper-Smith Scholarship Cheryl L. Adkins '81 Scholarship Margarette M. Aldredge Scholarship Robert F. Carr, Jr. & Ann Steger Carr '75 Scholarship Merry Lewis Allen Scholarship John E. Carr III Accounting Scholarship Dr. Edna Allen Dean Scholarship Alice E. Carter Education Scholarship Alpha Gamma Delta Memorial Scholarship Nancy Jane Jones Carter Music Scholarship Altavista Group SBDC Scholarship Barry J. Case Scholarship Longwood Alumni Legacy Scholarship Barry J. & Donna P. Case Scholarship Nan Gilbert Aman Memorial Scholarship Centra Southside Hospital Nursing Scholarship Mary Farley Ames-Lee Scholarship CHI Scholarship Robert M. Amey Memorial Endowment Roy Clark Music Scholarship Dr. J. Harold & Wynona F. Anderson Scholarship Dr. Theresa A. Clark, M.S. '88 Scholarship Anderson Family Scholarship Class of 1934 Teacher Education Scholarship Phala Leggette Andressen Scholarship Class of 1938 Scholarship Andrews Scholarship Class of 1939 Scholarship Ruth Denton Angleman Scholarship Class of 1940 Scholarship Rebecca Burch Anzelone '74 Scholarship Class of 1941 Scholarship ARAMARK Scholarship Class of 1942 Scholarship Susan Lawlor Arch Scholarship Class of 1943 Scholarship Suzanne & Suzie Arena Memorial Scholarship Class of 1944 Scholarship Athletic Scholarships General - Quasi-Endowed Class of 1945 Scholarship Jimmy Gayle Atkins Memorial Scholarship Class of 1947 Scholarship Isabelle Ball Baker Education Scholarship Class of 1948 Scholarship Shirley G. Barall Scholarship Class of 1949 Scholarship Verna Mae Barr Scholarship Class of 1950 Scholarship Diane T. Barrett Scholarship Class of 1952 Scholarship Dr. Paul T. Barrett Scholarship Class of 1953 Scholarship BB&T Scholarship Class of 1954 Scholarship Virginia Estes Bedford Memorial Scholarship Class of 1955 Scholarship Mildred Ferrell Bell Scholarship Class of 1957 - Gleaves-French Scholarship Keith Berkley Lifetime Runner Scholarship Class of 1958 Scholarship The Berryman Family Scholarship Class of 1959 Scholarship Mary Hanken & M. Hunt Berryman Scholarship Class of 1960 Scholarship Dr. Lee D. Millar Bidwell Scholarship Class of 1961 Scholarship Bishop Scholarship Class of 1962 Scholarship Bjorkholm/Walsh Scholarship Class of 1963 Scholarship Herbert R. Blackwell Freshman Scholarship Class of 1964 Scholarship Marian Margaret Beale Blair Scholarship Class of 1965 Scholarships Eleanor Weddle Bobbitt Scholarship Class of 1970 Scholarship Charles B. & Andrea G. Bolding Scholarship Class of 1971 Scholarship Sonny Bolton Scholarship Class of 1989 Scholarship Ida Bonicelli Trigiani & İrma Bonicelli Godfrey Scholarship Class of 1990 Scholarship Anne K. Bowman Memorial Scholarship Class of 1991 Scholarship Diane Bottoms Boxley Scholarship Class of 1993 Scholarship P. Seddon Boxley III Scholarship Class of 2004 Scholarship Sue Yeaman Britton Education Scholarship Lewis C. & Lillie B. Clements Scholarship Macon & Joan P. Brock '64 Scholarship Martha Stokes Cleveland Scholarship Graham S. Brown '20 Scholarship COBE Alumni Advisory Board Scholarship Brown Family Scholarship by Frances Young Brown Charles & Medora Cocke Scholarship Nancy Brown Richmond City Public Schools Scholarship Catherine Phillips Coenen Scholarship for Excellence David K. Buchanan Freshman Scholarship Elizabeth Cohen & Robert Dean Pope Scholarship Elizabeth Johnson Bullock '60 Memorial Scholarship Waverly M. Cole Scholarship Fund Harold D. & Annie Mae Cole Scholarship Linda Carter Burger '72 Scholarship Keaton Coleby Elam Busser Communication Studies Scholarship Evelyn Moore Coleman Scholarship

Collins-Cox Scholarship Frank-Webb Scholarship Marion Shelton Combs Education Scholarship Marion Camper Fuller Scholarship Communication Sciences & Disorders Fellowship Gamma Theta-Kappa Delta Scholarship Marge M. Connelly Scholarship Jettaka McGregor Gammon Scholarship John R. Cook Scholarship John Allen Gaskins Scholarship Martha E. Cook Scholarship Mrs. Bessie M. Land Gaskins Teacher's Scholarship Randy & Mary Copeland Scholarship Dr. Ray A. Gaskins Math & Computer Science Scholarship Kathryn Brown Copeland '88 Scholarship Dr. Ray A. Gaskins Basketball Scholarship Corbin-Bigby Scholarship Dr. Ray A. Gaskins Honors Scholarship Cormier Honors College for Citizen Scholars General Scholarships Edna Dawley Gibbs '34 Scholarship Richard Thomas Couture Scholarship Kathleen Goodwin Cover Scholarship Award Margaret Helm Gilmore Scholarship Cory Holland Creason '14 Memorial Scholarship Husie and Evelyn Hutcheson Glenn Scholarship Oliver & Nancy Piland Creekmore '67 Scholarship in Education Otelia Darden Godwin Memorial Scholarship Golden Corral Scholarship & Human Services Oliver & Nancy Piland Creekmore '67 Scholarship in Arts & Lillie Evelyn Goodrich Scholarship Sue Simmons Goodrich Scholarship Sciences Barbara L. Cridlin Scholarship Fund Franklin and Nita Grant Scholarship David & Patricia Crute Scholarship for Citizen Leadership Grant & Buccelli Scholarship Arlene D. Cundiff Scholarship The Patricia Finn Graves Scholarship W. Hoke Currie Athletics Scholarship Elmon T. and Pamela Burnside Gray Memorial Scholarship Betsy & R. Warwick Daniel Memorial Scholarship Margaret L. Grayson Scholarship Rebecca Parker Davis 1959 Scholarship Dorothy Martin Green Scholarship Lelia Holloway Davis Scholarship Janet D. Greenwood Scholarship Nell H. Griffin Scholarship Jay Christopher Deboer Memorial Scholarship Decade of the 60's Scholarship Jessie Schnopp Grigg Memorial Scholarship Jacqueline Epes Devany Citizen Scholar Scholarship Connie Knighton Grimsley Memorial Scholarship Djorko-Charleton Family Scholarship Marjorie Matthews Grizzard Scholarship Donahue Family Scholarship Jett Carter Groves Scholarship William F. & Martha J. Dorrill Scholarship James C. Gussett Scholarship Pauline B. Haga Music Scholarship Candice "Candy" Jamison Dowdy '69 Scholarship Ann Elizabeth Downey Memorial Scholarship Nancy Anderson Haga Scholarship Draper/Barksdale Modern Language Study Abroad Scholarship Helen McGuire Hahn Scholarship Carol Stoops Droessler Scholarship Melissa A. Haislip Memorial Nursing Award Lulie Evelyn Duke Scholarship Virginia Blanton Hanbury Scholarship Shirley Duncan Scholarship Hansen Family Scholarship Jessie Ball duPont Scholarships Sally Barksdale Hargrett Prize for Academic Excellence Martha Cooke Elder Scholarship Lois Barbee Harker Scholarship Peyton White Ellis '83 & Michael Stewart Ellis '84 Scholarship Edith Sibold Harper Memorial Scholarship Jane Donald Ellington '71 Scholarship Elizabeth R. Harris '81 & Elizabeth F. Harris '11 Scholarship George P. Elliot Education Scholarship Alton M. Harvill, Jr. Scholarship George P. Elliot Scholarship Susan Michael Harwood Memorial Scholarship Betty Jane Shackelford Ellison Memorial Scholarship Dr. Marilyn "Lindy" Hatch '63 Scholarship Elmore/Royall Scholarship Calvin P. Hatcher Scholarship English Education Scholarship Dr. James C. Haug & Mrs. Mary D. Haug Scholarship Virginia Gee Erickson Citizen Scholar Honors Scholarship Rob Havey Leadership Scholarship Tammara Marie Estes Scholarship Rachel L. Hazelwood 19 Citizen Leadership Scholarship Janie Wall Evans Scholarship T. Burt & Sarah Hazelwood Family Scholarship Androniki John Fallis '63 Scholarship Healy-Hallock Family Scholarship Bartholomew Family Scholarship Dr. Richard L. Heinemann Scholarship Dr. Berkwood M. Farmer Scholarship Heintz/O'Neil Scholarship Farmer Family Scholarship Dr. Paul B. Hesselink Scholarship Farmville Alumni Chapter Scholarship Paul P. Hicks, Jr. Scholarship Martha Walton High Scholarship Page Tolleson Faust '62 Memorial Scholarship Mary Clay Hiner English Scholarship William Ferrell Whitlock '80 Scholarship Carey Jeter Finley Scholarship Victoria Johnson Hoffius Scholarship JoAnn L. Fivel Scholarship Margaret Murry Holland Scholarship Beverly Kersey Flowers Scholarship Pamela Gustafson Holley Biology Scholarship Robert E. Ford, Jr. Scholarship Fave Charleton Hopkins Memorial Scholarship Patricia Skinner Foster Memorial Scholarship Mildred Davis House Scholarship Longwood University Foundation Board Scholarship Billie Stebbins Hubard Scholarship Dorothy Owen Hubbard Scholarship Melinda I. Fowlkes Scholarship

Paul and Frances Fox Scholarship

College of Business Scholarship

6 LONGWOOD UNIVERSITY FOUNDATION FOUNDATION 17



Louise Bradshaw Hubbard Memorial Scholarship Drew & Risa Hudson Family Scholarship for the Study of

Geriatric Care

Drew & Risa Hudson Family Scholarship

Hull Mathematics Scholarship

Hull Music Scholarship

Hull Biology Scholarship

Hull Scholars Excellence in Education Scholarship

Dr. Neil J. Humphreys Scholarship

Olive T. Iler Award

Mamie Gerdes Ingham Scholarship Caroline Ferguson Irons Scholarship

Elizabeth Burger Jackson Athletic Scholarship

Jackson Longwood Scholarship

James Wilfred "Jack" Jacques, Jr./Delta Sigma Pi Scholarship Byron L. Jamerson & Edward M. Cunningham Memorial

Scholarship

Jarman Honors Scholarship

Jarman Scholarhsip

Jason Foundation Fellowship

Elizabeth Rebecca Robertson Johnson & Frances Bland Robertson Fiveash Nursing Merit Scholarship

Bird-Jones Scholarship

Mary Elizabeth Daniel Jones Scholarship

Pearl H. Jones Scholarship

Norma Jean Croft Joyner Honors Scholarship Albert W. & Mary N. Joynes Scholarship Kappa Delta Founders' Scholarship Peggy Kennedy Memorial Scholarship Jerome Kersey Men's Basketball Scholarship

Nancy Tanley Kilgore Scholarship Mary Puckett Asher King Scholarship The Kinzer Scholarship in Music

Maria Sergeivna Konovaloff 1965 Scholarship

Helen MacLean Agnew Koonce '51 Memorial Scholarship

Donna Jenkins Kourtz Scholarship

Philippia Happy Hull Kyte '91 Memorial Scholarship

Dabney Stewart Lancaster Scholarship Lancer Club Advisory Board Scholarship

Lancer Legacy Scholarship

Dr. Merle & Mrs. Emily Landrum Scholarship Ripon & Claire LaRoche Scholarship

Eboni L. Lee '01 Athletics Scholarship

Leon & Sarah Corbin Bigby Scholarship for the Center for Citizen Scholars

Ruth & Mike Lewandowski Athletics Scholarship

N. Charles Lilley Scholarship Blair H. Lockamy Scholarship

Dr. Patton Lockwood Memorial Scholarship

Sue Puckett Lush Scholarship

Lynchburg Alumni Chapter Scholarships Phyllis L. Mable Citizen Leadership Award Linda Marie Hall Mahorney Scholarship

R. Kenneth Marcus Scholarship

William & Colleen McCrink Margiloff Scholarship

Edith May Marshall Scholarship Eloise Hodges Martinelli Scholarship Marlene Armour Mathers Scholarship Katharine Allen Maugans Honors Scholarship

McAnulty Scholarship for Nursing Mark D. McArdle Scholarship Paula C. McDonough Scholarship
Page & John McGaughy Scholarship

Christina and Kathryn McGinn Scholarship McGrath/Lewis Eastern Shore Scholarship

Wayne McWee Scholarship

McWilliams Family Scholarship

Thomas Edward Meadows, Jr. & Michelle Evette Meadows Softball

Scholarship

Meese-Wallace Exceptional Children Scholarship

Memorial and Honor Scholarship Donald A. Merkle Scholarship

Frances Anthony Meyer Scholarship

Harriet Butterworth Miller & William Tomlinson Miller

Scholarship

Todd Davis Miller Rugby Memorial Scholarship

Call Me MISTER Scholarship

Thomas M. & Martha S. Moffat Merit Scholarship Denise Hardie Monette Memorial Scholarship

Nancy I. Moore Nursing Scholarship Billie Morgan Scholarship

Pattie P. Morrow Scholarship Mortarboard Scholarship Barbara "BJ" Moss Scholarship

C.G. Gordon Moss History Scholarship

Dr. John Langdon & Barbara Greenquist Moss Scholarship

Moton Legacy Scholarship

Lucille B. & Thomas Wiley Murphy Honors Scholarship

Murphy-Lione Family Scholarship Janet Gormus Murray Scholarship John Henry Murry III Memorial Scholarship

John Henry Murry III Memorial Scholarsh David E. Napier Memorial Scholarship S. Virginia & Berta M. Newell Scholarship Elizabeth Savage Newlin Scholarship

First North Carolina Company Jamestowne Society Scholarship

Oakey Family Scholarship

Andrew O'Brien Memorial Scholarship

O'Hara-Waldo Scholarship

Elizabeth Overbey Omohundro Scholarship Mary Kay, Pearl & Waller Orr Scholarship Elizabeth Wright Otey Scholarship

M. Ralph Page Scholarship

Elizabeth Thompson Patrum Scholarship

Ruth Jennings Adams Patton Scholarship Addison Payne Memorial Scholarship Dr. Kenneth B. Perkins Scholarship

Kenneth B. Perkins & Marie Hoge-Perkins Scholarship

Charlotte Newell Phillips Scholarship Jane Royall Phlegar Scholarship

Piland-Russell Scholarship in Education & Human Services

Piland-Russell Scholarship in Arts & Sciences Marvin L. & Lelia W. Pollard Scholarship Pomp Family Citizen Leader Scholarship

Lacy W. & Audrey C. Powell Biology Citizen Scholarship

Beverly Wilkinson Powell Scholarship Prillaman-Davis Scholarship

Kyle Profilet, CFA, CPA Memorial Scholarship

Paula Clay Prouty Scholarship

Peter DeWitt and Phyllis Stancill Pruden Citizen Scholar Honors

Scholarship

Joseph P. Pugarelli Memorial Nursing Scholarship Florence Lee Putnam Memorial Scholarship S. Waverly and Annie V. Putney Scholarship

Helen B. & Ellis H. Putney, Sr. Memorial Scholarship

Patty & Jerry Ramsey Scholarship Dr. Kathleen Ranson Scholarship Norma Redmond Memorial Scholarship Register-Sharp Family Scholarship

Jessica Ann Bonney Reveley Scholarship Randy Reynolds, Jr. & Clay Caperton Scholarship

Sean Rodway Reynolds Memorial Scholarship
Francine Richardson Woodward & John W. Woodward

Scholarship

Ruth & Evelyn Richeson Memorial Scholarship

Margaret Nuckols Roberts Scholarship

Elizabeth Agnew Rosenberg Memorial Scholarship

Elizabeth Garrett Rountrey Scholarship Rust Teacher Education Scholarship

Dr. Sue Saunders Endowment for Counselor Education

Dr. Ronda L. Scarrow '80 Scholarship William E. & Carol R. Schall Fellowship Ilma von Schilling Scholarship

Doctors Marvin & Dorothy Schlegel Prize Mary Tabb Johnston Schubert '72 Scholarship Genevieve Moseley Schwartz Scholarship

Dr. Marvin W. Scott & Mrs. Lee Warriner Scott '62 Scholarship Marvin W. & Mary Lee Warriner Scott Nursing Scholarship

Catherine Meriwether Scott Scholarships Seba B. Sheavly Science Scholarship

Diane Sheffield Sociology/Anthropology Scholarship Short Pump Ruritan-Civic Foundation Scholarship

Siddons/Bailey Scholarship Sigma Alpha Iota Rose Scholarship

Maria Milian Silveira Scholarship Ann Snyder Simmons Fellowship Hylah Hope Camp Simmons Scholarship

Simmons/Kappa Delta Pi Scholarship Dr. R. C. Simonini, Jr. Memorial Scholarship

Dr. Mayling E. Simpson '68 Scholarship Helen B. Simpson Scholarship Kate Whitley Sloan '75 Scholarship

Elsie M. Small Scholarship

Hon. Edgar Ashley Smith Scholarship Linda Pritchard Smith '67 & Richard F. Smith Music Scholarship

Dr. Peggy B. Smith Scholarship Barbara B. Smith Scholarship

Clara Duncan Smith Memorial Scholarship

Dr. Maurice Sneller Scholarship

SNVC Institute for Leadership and Innovation Undergraduate Student Scholarship

SNVC Institute for Leadership and Innovation MBA Student Scholarship

Susan Eddy Soza & William Soza Scholarship

Mildred A. Spindle Scholarship

Nell Andersen Sprague Freshman Composition Award Rosemary Sprague Memorial Scholarship

Rosemary Sprague Quasi-Endowed Scholarship Steven and Linda Olsen Spruill Scholarship Alice C. Stallard Endowed Scholarship

Maria Bristow Starke Scholarship Edith Stevens Scholarship

Stokes-Barnes Memorial Scholarship Anita Carol Stowe '77 Athletics Scholarship

Edith Goff Street Scholarship

Dr. William "Bill" Stuart Memorial Scholarship Dr. Donald Cameron Stuart III Memorial Scholarship

Florence H. Stubbs Scholarship

Adam & Lacy Sunukjian Scholarship

Talley Tribute Scholarship

Ashley Warren Taws Scholar Athlete Award

Tawse Scholarship

Garrett A. Taylor Memorial Scholarship

Centennial Scholarship

Team Martin for the Win Scholarship Justice John Charles Thomas Scholarship

Dr. James Thornton '85 & Mrs. Mary Larkin Thornton '88

Scholarship

Camilla C. Tinnell and Wayne H. Tinnell Scholarship

Camilla C. & Helen B. Tinnell Scholarship Wayne H. Tinnell Biology Scholarship Wayne H. Tinnell-Hines Scholarship Jerolien Tanner Titmus Scholarship

Frances W. Titsworth Scholarship Mary Tolley Scholarship TowneBank Art Scholarship

Franklin Federal Scholarship (no copy of agreement in FE)

Marjorie Crismond Tremaglio Scholarship Joyce M. Trent Psychology Scholarship David & Lynn Tucker Scholarship

Larry C. & Elizabeth W. Tucker Scholarship Michael Tucker Baseball Scholarship

Elsie Stossel Upchurch '43 Scholarship Mary Jane Vaden Scholarship

Verhappen Family Athletics Scholarship Beverly Gaskins Vincent Scholarship

Lula B. and J.C. Vincent and Brenda Vincent Cross Scholarship Virginia Price Waller Education Scholarship

James E. Walmsley Scholarship Lady Boggs Walton Scholarship Lucile Walton Art Scholarship

Lucile Walton Biology Scholarship Hunter & Llewellyn Watson Scholarship

Brad Watson Scholarship

Gene & Patsy Garrett '75 Watson Scholarship Louise Brightwell Watson Education Scholarship

Margaret Hunter Watson Scholarship

Virginia D. Watts Citizen Scholar Honors Scholarship Shelby Waugh Award for Excellence

Dr. M. Herbert Weiss & Mrs. Henrietta Shapiro Weiss Scholars

Dr. Carolyn Wells Scholarship Wells Fargo Bank Diversity Scholarship Program

Wells Fargo Bank Scholarship Wertz Family Scholarship

Robert P. Webber Scholarship

Rena Weld Wheeler Memorial Scholarship Brian F. Whetzel Scholarship

Joyce G. Whitlock '61 Scholarship Edward M. & Mattie Leigh Fretwell Whitlock '17 Scholarship

Wilcox-Ross Scholarship

Elizabeth Mann Wilds Memorial Scholarship

Wilkinson-Bock-Whitlock Delta Kappa Gamma Education Scholarship

Henry I. Willett, Jr. Longwood Scholar Frances Roberdeau Wolfe Longwood Scholar Betty Gail Payne Wolfrey Scholarship Helen Cody Wright Scholarship

Margie Lee Culley Wygal Scholarships Talmadge "Tal" H. Yeatts Scholarship

LONGWOOD UNIVERSITY FOUNDATION

FOUNDATION



To me, getting
a scholarship
means that I am
making valuable
contributions to
the Longwood
community. I love
that idea of giving
back to a community
that has given so
much to me."

TAYLOR GRACE MURPHY

Class of 2023 Biology Danville, Virginia

Lucy Walton Biology Scholarship



Endowed Programs

Programs provide essential resources to develop and assist students beyond the classroom and often beyond the campus allowing students to expand their knowledge, experience and opportunity.

Alumni Lecture Series

Anthem Practicum in Health, Athletic Training, Recreation and Kinesiology

Barbara Bishop LCVA Lecture Series

Barbara Lee Bishop Eminent Scholar Endowment

Wells-Bishop LCVA Internship

Brock Endowment for Transformational Learning

Helen E. Castros Fund (Female Teams)

Chamber Music Series Endowment

Kathleen Florence Clark Fund

Roy Clark Music Student Travel Account

College of Arts & Sciences-Rotunda Endowed Fund

Cook Symphony Fund

Cook-Cole College of Arts & Science Fund

Cormier Honors College for Citizen Scholars Program

Dan Daniel Senior Award

Faculty Development Endowment

Faculty Enrichment

Grimsley Social Studies Book Purchase

Melissa A. Haislip Memorial Nursing Award

Hardy House Endowment

HSF End - Education/Programs

HSF End - Maintenance

HSF END - Manager

Dr. James W. Jordan Archeology Field School

Endowment

Kraemer Family Graduate Assistantship

LCVA - Curator of Programs Endowment

LCVA - Oppenhimer Fund

LCVA - Quasi-Endowed Operating

LCVA- Jacqueline Wall School Programs Educator

Endowment

LCVA -Program Endowment

Library Endowment

Jane Aman Liepis Research Award for the Arts

Alice Lemmon Lockridge & Virginia Lee Coleman

Fund

Longwood Cares - Emergency Endowment for Students

Badger-Magnifico Mathematics Award

McGaughy Center for Professional Development

Mottley Art Purchase

Mary Ellen Munoz Archaeology Field School Fund

John Dos Passos Prize for Literature

Maude Glenn Raiford Faculty Award

Ranson Eminent Scholar

Shiv Sharma Memorial Endowment

Wilma Register Sharp & Marc Boyd Deanship

Simkins Southern History Award

R.C. Simonini Memorial Book Award

Rita M. & Hilary M. Smith Fund

Class of 1967 Endowment for Speech, Hearing, &

Learning Services

Sprague Cultural Enrichment

Staples Lecture Series

McGaughy Center Endowment

Ruth Tillett '49 & Virginia Tillette Speech, Hearing &

Learning Services Operating Endowment

Warriner-Burke Archeology Field School Endowment

John D & Jean Cunningham Wilson International

Travel Fund

Henry Alexander Yancey, Jr. M.D. Endowment

HSF - Hull Springs Farms LCVA - Longwood Center for Visual Arts



Brandon Haffner, **Assistant Professor** of Creative Writing and Chair of the Dos Passos Prize Committee and Jury, interviews the 2021 JDP Prize winner, Monique Truong this past spring.

John Dos Passos Prize for Literature

In 1980, Longwood University founded the John Dos Passos Prize for Literature to honor one of the greatest American writers of the twentieth century by recognizing other writers in his name. The John Dos Passos Prize for literature is the oldest literary award given by a Virginia college or university, honoring this talented writer. The prize is presented annually to honor a writer whose work offers incisive, original commentary on American themes.

Each year, the John Dos Passos Prize for Literature is administered by a committee from the Department of English and Modern Languages; the chair of the committee also serves as the chair of the prize jury which

includes the immediate past recipient and a distinguished critic, editor, or scholar. The prize jury awards the prize to an American creative writer who has produced a substantial body of significant publication that displays characteristics of John Dos Passos's writing: an intense and original exploration of specifically American themes, an experimental approach to form, and an interest in a wide range of human experiences.

Each year the writer visits the Longwood campus during the spring semester for a few days, during which they participate in at least one class in the Department of English and Modern Languages. At the conclusion of the

2006 Kent Haruf

1999 Eric Kraft

visit, there is a public "Reading + Interview" event open to the Longwood and Farmville community during which the author reads from their work before sitting down on stage to have a discussion about the prize and their writing. Questions for the interview portion are curated by Longwood students. In recent years, the prize jury has attended this event as well, providing additional opportunities for students and the community to interact with world class writers and editorial professionals.

Assistant Professor of Creative Writing and Chair of the Dos Passos Prize Committee and Jury, Brandon Haffner believes this unique opportunity also exposes students to a diversity of perspectives and lights a path to prospects they may not have previously explored. Longwood students have the opportunity to mingle with the writer and the Dos Passos prize jury after the presentation. Professor Haffner says, "You see certain

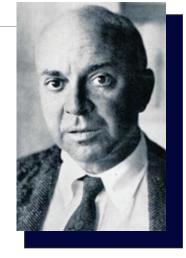
students come out of their shells when reading the prize winner's work leading up to the event, and they get more and more excited to meet the author."

The John Dos Passos Prize for Literature is primarily funded by the Carson & Sharon Coulter Gibb '64 Endowment. During her time at Longwood, Sharon majored in English and recalls special programs Longwood required students to attend; however, they were not literary programs. When she learned Hollins College (now University) held a literary festival each spring, Sharon began attending the program. Upon the death of her husband, Sharon wanted to create a way to honor his memory at Longwood. Working with Franklin Grant of the University's Advancement Office, Sharon began supporting the John Dos Passos Prize for Literature in memory of her husband "and in envy of the Hollins girls."

ABOUT JOHN DOS PASSOS

John Dos Passos was born in 1896 in Chicago as the child of parents already married to other people. He lived for years with his mother in Europe, then returned to the United States to attend preparatory school. He discovered his interest in writing at Harvard, graduating in 1916.

After Harvard, Dos Passos joined the war effort as an ambulance driver in France; during this time he gathered the information for his first two novels, launching his writing career as he explored his views of postwar America.



PAST RECIPIENTS

2021 Monique Truong 2020 Aleksandar Hemon 2019 Rabih Alameddine 2018 Karen Tei Yamashita 2017 Chang-rae Lee

2016 Danzy Senna

2015 Paul Beatty 2014 Ruth Ozeki 2013 Sherman Alexie 2012 Colson Whitehead

2011 Mat Johnson 2010 Percival Everett 2009 Robert Bausch

2008 Allen Wier

2005 Tim Gautreaux 2004 Maureen Howard 2003 Richard Powers 2002 Randall Kenan 2001 Madison Smartt Bell 2000 Jill McCorkle

1998 Maxine Hong Kingston 1997 Annie Proulx

1995 Helena Maria Viramontes

1994 James Welch 1993 Ernest J. Gaines

1992 William Hoffman 1991 Elizabeth Spencer

1990 Larry Woidode 1989 Paule Marshall

1988 Shelby Foote

1987 Lee Smith

1986 John Edgar Wideman

1985 Russell Banks 1984 Tom Wolfe 1983 Dorris Betts 1982 Robert Stone

1981 Gilbert Sorrentino

1980 Graham Greene

LEARN MORE ABOUT The John Dos Passos Prize for Literature:



LONGWOOD UNIVERSITY FOUNDATION **FOUNDATION REPORT**

Financial

Overview

This growth was primarily due to positive market performance from our investment portfolio, along with continued financial support from our donors. The Foundation also employed favorable administrative cost control measures, resulting in the ability to designate unspent monies toward an increase in its endowment reserves. The Foundation

continues to be a reliable and generous source of

funding for the University's students and programs.

PERIOD ENDING 12/31/2021

38%

University Support

Fundraising

Administrative

12%

39%

The Foundation ended 2021 with a significant increase in endowed and total net assets.

This market performance allowed our statement of activities to show a \$14.7 million positive change in net assets for the fiscal year ending December 31, 2021. Our statement of financial position shows \$116 million in total net assets, including \$105 million in the endowment for the benefit of student scholarships and programs.

PERMANENTLY RESTRICTED FOUNDATION EXPENSES ENDOWMENT PERIOD ENDING 12/31/2021 71% Scholarships & Awards Other Other Endowment Gifts Scholarships & Grants

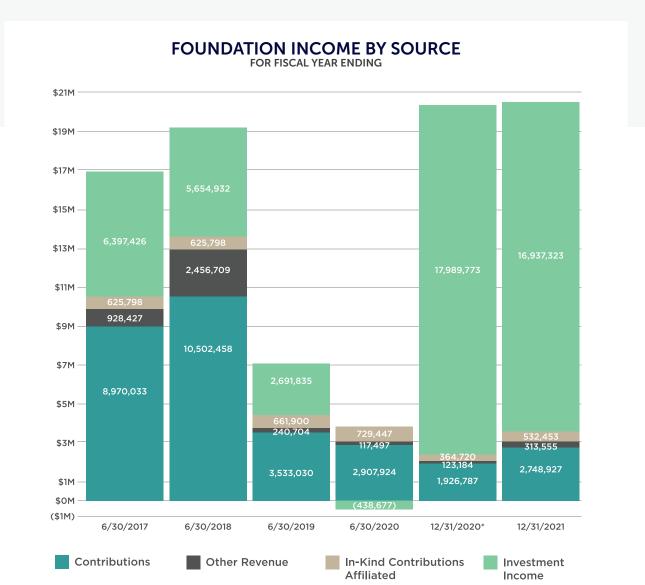
Programs

Total benefits transferred by the Foundation to the University for Fiscal Year ending December 31, 2021 exceeded \$4.5 million, including \$2,215,385 for scholarships and \$2,288,572 for program and annual gifts. Administrative expenses to operate the Foundation were \$716,306, with excess funds from our administrative fee designated by our Board to increase our reserves.

Our donors continued to recognize the importance of the mission of our Foundation. Gifts raised by University Advancement and received by the Foundation for fiscal year ending December 31, 2021 totaled \$2,748,927. Amounts designated to

be spent in the current year were transferred to Longwood University, and donations intended for the endowment were invested for the benefit of future spending for student scholarships and programs.

Additional revenue was earned from the sale of wetland mitigation banking credits created as a result of past environmental improvements at Hull Springs Farm. These proceeds are held by the Foundation until requested by the University for any costs related to operations and capital projects associated with the Baliles Environmental Center at the 600-acre farm in Westmoreland County.



*12/31/2020 is a six-month stub period. As of 12/31/2020 the Foundation changed its fiscal year to calendar year.

LONGWOOD UNIVERSITY FOUNDATION **FOUNDATION REPORT**

STUDENT IMPACT

INVESTMENTS

For the fiscal year ending December 2021, the Foundation's investment portfolio, while incurring significant volatility, ended the year exceeding both its short term and 10-year average return benchmarks. Our endowed net assets, at December 31, 2021, have grown an impressive 44.4% since June 30, 2020 and 16.0% since December 31, 2020. This increase is after the Foundation's annual distribution of its scholarship and program funds based on a 4% spend rate and its annual administrative fee used to cover operating costs and any designated additions to reserves.

Our external investment managers continue to execute appropriate yield-related risk reward strategies in line with our goal of preservation of principal while seeking growth. The Foundation's investment strategy and asset risk management is implemented through the use of qualified investment managers and certain self-directed investment allocations. Monies invested are diversified and rebalanced in line with asset allocation and risk mitigation policies. Our goal is to achieve a 10-year average annual return of 8%+ to meet our scholarship and program awards and administrative funding needs while allowing the endowment to grow at a pace to potentially offset inflationary pressures from any tuition and room and board increases.

SPENDING AND DISTRIBUTIONS

The Foundation Board of Directors seeks to keep the total administrative fee charged to the endowment at less than 1.50% annually. This administrative fee is used to cover operating costs and provide for other designated uses. These operating

costs primarily include staff compensation and benefits, reporting and administrative hardware and software, and outside professional fees for annual audit and regulatory filings. Along with those costs, the Foundation allocates funds to its reserves and provides certain contributions to fundraising and other University areas to include operating improvement projects.

To minimize the impact that short term market volatility and fluctuations have on endowment market values, the Foundation calculates its scholarship award spending based on a 12-quarter trailing average. The Foundation Board sets a spending rate (currently 4%) on that averaged balance to provide for funding scholarship commitments to the University's students and its programs.

CONCLUSION

The Foundation's financial results for fiscal year ending December 31, 2021, in addition to the latter half of 2020 provided for a significant increase in our endowment and ability to provide funding to the University. The Foundation continued its long history of strong stewardship to our devoted donors, meeting all regulatory reporting requirements and receiving annual audits of our Consolidated Financial Statements. The Foundation and University recognize the importance of growing our endowment as a way to make the educational experience affordable for students. We continue to seek growth of our endowment through sound investment policies, balanced spending, and the continued generosity of donors who are committed to providing support for our future citizen leaders.



MACKENZIE HARRY

Class of 2023
History
Midlothian, Virginia
Lettie Pate Whitehead
Scholarship, C.G. Gordon
Moss Scholarship for
Excellence in History,
Elizabeth Cohen and
Robert Dean Pope
Scholarship



I am forever grateful for my donors and scholarships; without them I would not be here."

LONGWOOD UNIVERSITY FOUNDATION 27



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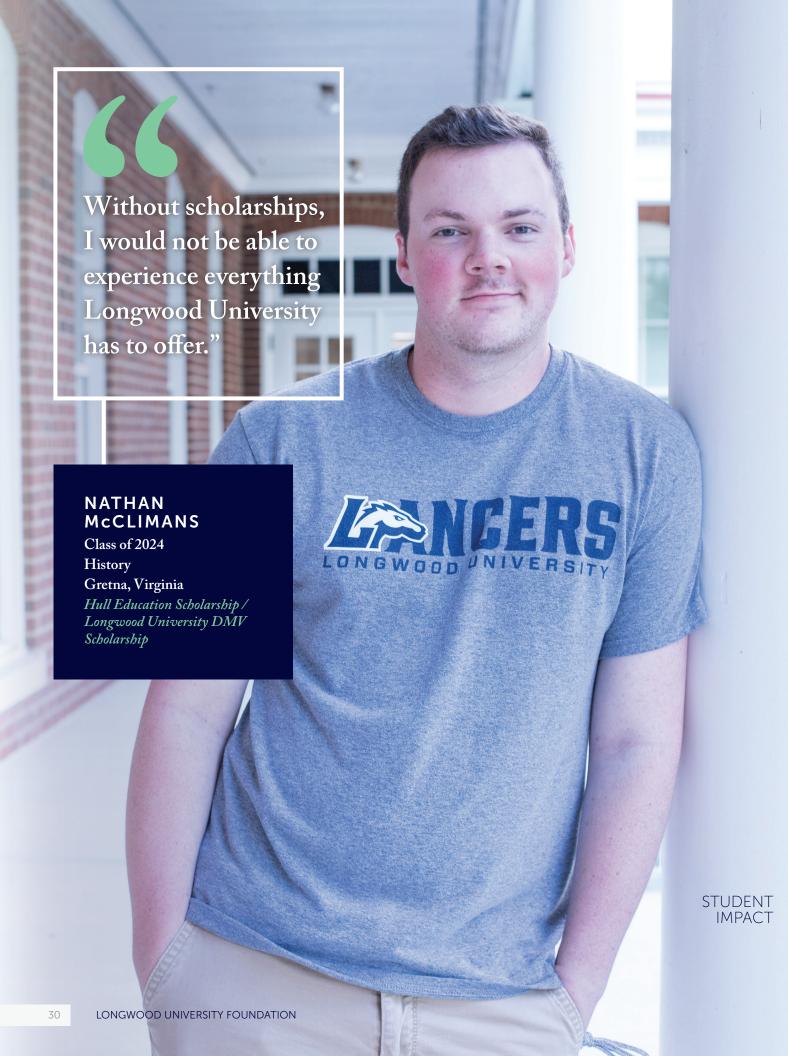
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Nathan Boyle Student Government Association Treasurer

Kevin Hutzler Lancer Student Investment Fund Manager





Our Staff

The Foundation maintains an efficient staff of talented people managing gifts, investments, and distributions for the benefit of Longwood University, its students and faculty. Our staff collaborates with the University to understand its priorities and engages with scholarship recipients to connect them with donors and opportunities.

FULL-TIME STAFF

T. Burt Hazelwood, CPA Chief Executive Officer

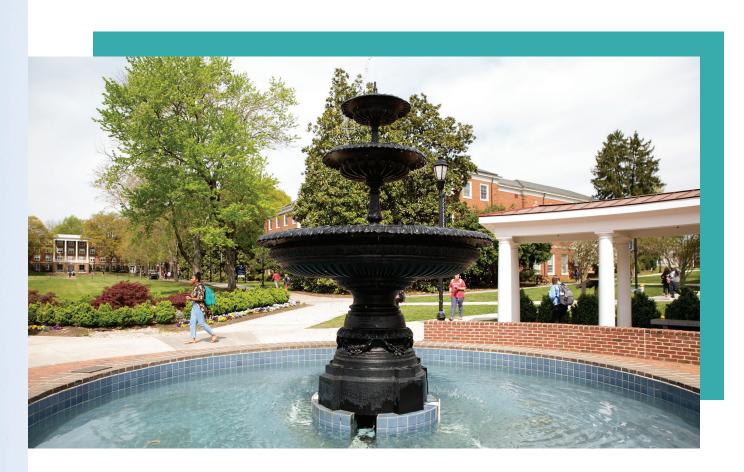
Dian Dyckes Controller

CJ Baker Staff Accountant

Cheryl Baggs Director of Operations **ENGAGED CONSULTANTS** (PART-TIME):

Mike Moore, CPA Fahrenheit Advisors, OCFO

Amy Carneal, CPA Fahrenheit Advisors, Senior Accountant



How to Give

For more information about LUF, the work we do, or ways to increase the endowment in support of scholarships, please contact us at (434) 395-4879.

Longwood University Foundation, Inc. 201 High St., Eason G-28

Farmville, VA 23909

longwood.edu/foundation

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