



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Meeting of the General Faculty and Faculty Council

Friday, March 23, 2007
3:00 p.m.

Hitchcock Multipurpose Room

Sonja Haynes Stone Center for Black Culture and History

Chancellor James Moeser and Faculty Chair Joseph Templeton presiding

AGENDA

- 3:00 Welcome, Opening Remarks, and General Questions
- Chancellor James Moeser
 - Provost Bernadette Gray-Little
- 3:30 Committee Reports
- Buildings and Grounds (Presented by Prof. David Owens, Chair)
 - Copyright (Presented by Prof. Leah Dunn, Chair)
 - Resolution 2007-6. Encouraging use of Office of Technology Development's Resources for the Commercialization of Works
 - Scholarships and Student Aid (Presented by Prof. Charles Daye, Chair, and Shirley Ort, Associate Provost and Director, Department of Scholarships and Student Aid)
- 4:00 *Second Reading*: Resolution 2007-4. Amending The Faculty Code of University Government as it Relates to The Schools and Colleges; The General College; The College of Arts and Sciences; The Graduate School; The Summer School; Records, Registration, and Undergraduate Admissions; Administrative Board of Student Affairs; and Administrative Board of the Library.
- Prof. Michael Lienesch, Chair, University Government Committee
- 4:05 Educational Policy Committee Report and Proposal on Adopting the Achievement Index as the Metric for University-Wide Comparative Rankings of Students
- Prof. Peter Gordon, Chair of EPC Subcommittee on Grading
- 5:00 Adjourn

Buildings and Grounds Committee
(Appointed by the Chancellor)
Annual Report--2006

Members:

Class of 2009: Joseph Jordan (on leave for 2006-07); Rachel Willis; Peter White; Linwood Futrelle; Fred Mueller (serving for 2006-07).

Class of 2008: Thomas B. Clegg; Margaret Miller; David Owens (chair).

Class of 2007: Jim Hirschfeld; Melinda Meade; Thomas Campanella.

Student Members: John Miller; Brendan Kereiakes, Katherine Zeiss

Members leaving committee during past year: Fred Mueller; Bynum Walter; John Francis.

Meetings during past year (2006): 1/5, 2/2, 3/2, 5/4, 6/1, 6/29, 9/7, 11/2, 12/7.

Report prepared by: David W. Owens (Chair).

Committee charge: The committee advises the Chancellor on siting and external appearance of new buildings and additions, removal of facilities, changes in long term use and appearance of campus grounds, selection of architects for University projects, preparation of long-range campus plans, placement and design of signs and campus art works.

Previous Faculty Council questions or charges: None.

Report of Activities:

Site recommendations (8): Dental Sciences complex; Scoreboard, Ehringhaus field; Fuel tanks at Airport Dr. complex; Parking at Giles Horney Building; Water feature in Coker Arboretum; Scoreboard at Henry Field; Bell Tower parking and liner building; Carmichael Auditorium additions.

Architectural firm and designer recommendations (10): Raleigh St. stone wall repair and replacement; Carroll Hall roofing; Sports Medicine; Fuel tanks at Airport Dr. complex; Division of Laboratory Animal Science facility; Bynum Hall renovations; Brinkhous-Bullitt renovations; MacNider renovations; Hill Hall Auditorium renovations; Beard Hall window replacements.

Exterior design and site plan recommendations (11): New Venable; Horney Building parking and access; Boshamer baseball stadium expansion and streetscape improvements; Scoreboard and landscaping at Henry Field; Raleigh Rd. stone wall replacement; Carolina Commons housing project; Morehead Planetarium and Science Center expansion; Bell Tower Phase I; Genomic Sciences building; Pedestrian bridge, South Road-Bell Tower; Carmichael Auditorium expansion and renovation.

Demolition recommendations (2): Dental Office and Dental Research buildings; Nash Hall.

Landscape and ground recommendations (4): Bench locations, Phillips Hall; Bench locations, Morrison Residence Hall; Nash Hall parking and landscaping; Bench location, Tarrson Hall.

Signage recommendations (5): Dogwood Parking Deck signage; Memorial Hall ticket office; Way-finding prototype and locations; Building location sign prototype; Paul Green Theater banners

Campus art recommendations (1): Sculpture at Hyde Hall.

Plan and policy recommendations (6): Arts Common Phase I; Campus sustainability report; Campus master plan update; Development Plan modifications; Carolina North plan review; Campus memorial tree policy.

Other: David Owens serves on the Facilities Planning Committee and the Carolina North Steering Committee.

Recommendations for actions by Faculty Council: None.

**2006-2007 ANNUAL REPORT OF
THE UNIVERSITY COMMITTEE ON COPYRIGHT
TO THE FACULTY COUNCIL**

March 23, 2006

Members: Robert S. Dalton (2009), Leah McGinnis Dunn (chair) (2007), Sarah Michalak (2008), Barbara Moran (2007), Virginia Neelon (2009), John Semonche (2007), Michael Votta (2008)

Graduate student representative: Morgan Stoddard

Ex officio: Deborah Gerhardt, William Fletcher Fairey, Sian Hunter, Sallie Wright

Charge: The committee represents to the chancellor and the University community the concerns of faculty and other users and creators of scholarly information. The committee's functions include:

- 1) monitoring trends in such areas as institutional or consortial copyright use policies, changes in copyright ownership models, and guidelines for fair use of information in all formats;
- 2) identifying areas in which policy development is needed and recommending to the chancellor new or revised institutional policies and guidelines;
- 3) cooperating with the administration to propose and monitor the application of University policies and guidelines regarding ownership and use of copyrighted or licensed scholarly works; and
- 4) assisting in identifying educational needs of the faculty and others related to compliance with copyright policies and guidelines, and advising on appropriate ways to address those needs.

Membership:

Sallie Wright became an ex-officio member of the copyright committee, replacing Jeanne Smythe after her retirement.

Three members' terms will expire this year: Leah McGinnis Dunn, Barbara Moran and John Semonche.

Meeting Dates for 2006-2007:

October 2, 2006

November 6, 2006
December 4, 2006
January 8, 2007
February 5, 2007
March 5, 2007
April 2, 2007

2006-2007 Activities:

The committee engaged in several activities this year:

1) Amendment to Copyright Policy Regarding Commercialization

Cathy Innes, Director of the Office of Technology Development (OTD), approached the Copyright Committee with a proposal to amend the current Copyright Policy in such a way as to provide a greater share of royalties to faculty when the University, through OTD, commercializes their copyrighted works. Under the current policy, if OTD commercializes a work originally copyrighted by a faculty member, the faculty member receives 40% of the revenue that the University receives for such work (such percentage is calculated after the University has paid expenses, if any, it has incurred in commercializing the work). Under the proposed revised policy, such faculty member would receive 70% of such royalty (again such percentage is calculated after the University has paid expenses, if any, it has incurred in commercializing the work). Ms. Innes believes that this policy change will encourage faculty creators of certain kinds of works to use the resources offered by OTD.

The revised policy does not require that faculty commercialize their works through OTD or to commercialize them at all. Faculty owning copyright in their works would continue to be free to choose if and how they make their works available to the public. Also, the revised policy does not require that OTD, if requested, commercialize any particular work; OTD would have discretion to choose the works it commercializes. Generally, OTD would only commercialize those works for which it can provide some expertise, in particular, software and multi-media works.

After discussing this proposal and reviewing drafts of the proposed change (see Exhibit 1 for current draft), the Copyright Committee agreed that such changes would benefit the University community without imposing any new burdens or restrictions on

current practices. Therefore, the Copyright Committee recommends that the Faculty Council approve the resolution attached hereto.

Table 1: Works where copyright is owned by faculty or EPA non-faculty

Note: Percentages are approximate. Revenue distribution is to be applied after University is reimbursed for incremental expenses.

	Current royalty distribution	Proposed royalty distribution
Amount to Office of Technology Development	20%	10%
Amount to creator(s)	40%	70%
Amount to creator's department or unit	40%	20%

Table 2: Works where copyright is owned by University*

Note: Percentages are approximate. Revenue distribution is to be applied after University is reimbursed for incremental expenses.

	Current royalty distribution	Proposed royalty distribution
Amount to Office of Technology Development	20%	20%
Amount to creator(s)	0%	40%
Amount to creator's department or unit	80%	40%

***Jointly Owned Works:**

When a Traditional or Non-Directed Work is jointly owned by the University and by University faculty or EPA non-faculty creator, such owners shall meet to determine the ownership interest of each party. A percentage of the work determined by the parties to be owned by the University faculty or EPA non-faculty creator(s) will be distributed

in accordance with Table 1; a percentage of the revenue which is equal to the percentage of the work determined to be owned by the University will be distributed in accordance with Table 2.

See Exhibit 1 hereto for redline showing specific changes to the Copyright Policy.

2) Redesign of the copyright committee's website

The committee redesigned its website to update available copyright resources, and make them appear more prominently on the website; to organize links to make clear which resources are campus, university system, and external resources; to ease navigation of the site; and to make organizationally clear material that is committee-related. The copyright committee's website can be found at:
<http://www.lib.unc.edu/copyright/>

3) Outreach to faculty on copyright issues

To aid in developing a plan to reach faculty regarding copyright issues, the committee reviewed the recently released "Campus Copyright Rights and Responsibilities: A Basic Guide to Policy Considerations" published in coordination with the Association of Research Libraries. Discussion of this document focused on two issues:

- 1) implications for policy as it relates to infringement on the UNC computer network, which led to discussions with Vice Chancellor of Information Security (see #4 below), and
- 2) classroom use of copyrighted materials.

This document outlines factors to consider when developing a policy regarding fair use of copyrighted materials in the classroom. The committee compared its current policy to this document. The committee found that current policy addresses the factors outlined in this document because current policy a) supports the exercise of responsible, good faith exercise of fair use rights and b) recommends a fair use analysis based on the four factors affecting fair use.

Because every evaluation of fair use is unique and fair use isn't always easily determined, UNC Legal Counsel, referred to in current policy as a resource for guidance in determining fair use, should continue to be promoted as a faculty resource for fair use analysis. Future initiatives will focus on how to disseminate this information to faculty.

Ex-officio member of the Copyright Committee Deborah Gerhardt, attended the Association of Research Libraries Institute on Scholarly Communication and reported on ideas for outreach to faculty both as a copyright committee and in collaboration with the Scholarly Communications Committee.

4) Revising policy regarding copyright infringement on the UNC computer network

Assistant Vice Chancellor for Information Security Sallie Wright outlined her office's role in dealing with copyright violations. Recent initiatives aimed at decreasing downloading violations have not had the full impact that is desired, so she will approach the committee with proposed copyright policy changes that will relate to peer-to-peer sharing.

Submitted by:

Leah McGinnis Dunn, chair
Robert S. Dalton
Sarah Michalak
Barbara Moran
Virginia Neelon
John Semonche
Morgan Stoddard
Michael Votta
William Fletcher Fairey, ex officio
Deborah Gerhardt, ex officio
Sian Hunter, ex officio
Sallie Wright, ex officio

Resolution Recommended for Action by the Faculty Council:

**Resolution xx-x
Encouraging use of Office of Technology Development's
Resources for the Commercialization of Works**

WHEREAS, the University wishes to encourage the dissemination of copyrighted works owned by the faculty;

WHEREAS, one form of dissemination, the commercialization of works, provides one model for distribution of works to the public;

WHEREAS, the Office of Technology Development (OTD) has expertise in the commercialization of certain kinds of works and wishes to assist faculty with the dissemination and commercialization of those works;

WHEREAS, OTD believes that the current Copyright Policy does not provide sufficient economic incentive to faculty authors of certain kinds of works to use OTD's services to commercialize those works;

WHEREAS, OTD believes that increasing the revenue that the University shares with such faculty will create such an incentive;

WHEREAS, the proposed increased economic incentive is consistent with the revenue sharing currently provided under the University's Patent and Copyright Procedures;

WHEREAS, use of the services of OTD will continue to be optional for faculty who own copyright in their works;

WHEREAS, OTD will not be required to commercialize any particular work;

NOW THEREFORE, the General Faculty resolves as follows:

The Copyright Policy of the University of North Carolina at Chapel Hill should be modified in the form as substantially set forth in Exhibit 1 hereto in order to permit the University to increase the amount of revenue shared with creators, including faculty creators, of copyrighted works commercialized by the University's Office of Technology Development.

Exhibit 1A

Sections V through VII of the Copyright Policy of the University of North Carolina at Chapel Hill to be amended substantially in the form set forth below:

Section V. C.

~~(e) Commercialization; assignment to University.~~

~~Where a University faculty or EPA non-faculty creator of a Traditional or Non-Directed Work desires assistance from the University in commercializing the work, the creator shall report the work to the Office of Technology Development using such forms and procedures as that Office shall establish, and if in its discretion it agrees to accept the work for commercialization, the Office of Technology Development shall undertake best efforts to commercialize the work. If the University is to be involved in commercializing a Traditional or Non-Directed Work, the creator shall assign the work to the University under an Assignment Agreement including but not limited to provisions outlining the commercialization responsibilities of the Institution and a mechanism for the sharing of commercial proceeds with the creator.~~

~~(d) Allocation of Commercialization proceeds:~~

~~When any Traditional or Non-Directed Work is assigned to the University and commercialized by the University, income from such commercialization shall be apportioned according to the formula set out in the University Patent and Copyright Procedures.~~

Section VI.

~~[DELETED SECTION MOVED TO ARTICLE VII BELOW]~~

VI. Commercialization of Copyrighted Works.

A. Works Owned by Faculty or EPA Non-Faculty

(1) A University faculty member or an EPA non-faculty employee may commercialize works that he/she owns pursuant to this policy.

(2) A University faculty member or an EPA non-faculty employee that owns a work pursuant to this policy may seek assistance from the University in commercializing the work. Under such circumstance, the creator shall report the work to the Office of

Technology Development using such forms and procedures as that Office shall establish, and if in its discretion it agrees to accept the work for commercialization, the Office of Technology Development shall undertake best efforts to commercialize the work. If the Office of Technology Development undertakes to commercialize the work, the creator shall assign the work to the University under an Assignment Agreement including but not limited to provisions outlining the commercialization responsibilities of the University and a mechanism for the sharing of commercial proceeds with the creator.

(3) Unless agreed otherwise in a written agreement, when a work owned by a University faculty member or an EPA non-faculty employee work pursuant to this policy is assigned to the University and commercialized by the University, income from such commercialization shall be apportioned according to the following formula:

The revenue that the University actually receives from its commercialization of such work will be applied first to reimburse the University for incremental expenses, if any, incurred by it in licensing such work (including attorney fees). The remaining revenue will be distributed as follows:

(a) 10% will be retained by the Office of Technology Development and used to support its mission;

(b) 70% will be distributed to the author of such work (in the case of co-authors, the distribution will be divided equally among them, unless either the co-authors have reached a written agreement providing for a different distribution or the University, in its sole discretion, determines a different distribution is appropriate); and

(c) to the extent practicable and consistent with State and University budget policies, the remaining revenue shall be distributed to the author's department or unit (in the case of co-authors, the distribution will be divided equally among the departments or units of the co-authors, unless either such departments or units have reached a written agreement providing for a different distribution or the University, in its sole discretion, determines a different distribution is appropriate).

The Office of Technology Development or any successor thereto shall administer the receipt and distribution of such proceeds.

B. Work Owned by University

1. The University may in its sole discretion commercialize works that it owns pursuant to this policy.

2. Unless agreed otherwise in a written agreement, when a work owned by the University pursuant to this policy is commercialized by the University, income from such commercialization shall be apportioned according to the following formula:

The revenue that the University actually receives from its commercialization of such work will be applied first to reimburse the University for incremental expenses, if any, incurred by it in licensing such work (including attorney fees). The remaining revenue will be distributed as follows:

(a) 20% will be retained by the Office of Technology Development and used to support its mission;

(b) 40% will be distributed to the author of such work (in the case of co-authors, the distribution will be divided equally among them, unless either the co-authors have reached a written agreement providing for a different distribution or the University, in its sole discretion, determines a different distribution is appropriate); and

(c) to the extent practicable and consistent with State and University budget policies, the remaining revenue shall be distributed to the author's department or unit (in the case of co-authors, the distribution will be divided equally among the departments or units of the co-authors, unless either such departments or units have reached a written agreement providing for a different distribution or the University, in its sole discretion, determines a different distribution is appropriate).

C. Jointly Owned Works

Work Jointly Owned: When a Traditional or Non-Directed Work is jointly owned by the University and by University faculty or EPA non-faculty creator, such owners shall meet to determine the percentage ownership interest of each party. The revenue that the University actually receives from its commercialization of such work will be distributed as follows: a percentage of the revenue actually received which is equal to the percentage of the work determined by the parties to be owned by the University faculty or EPA non-faculty.

creator(s) will be distributed in accordance with Section A(3) above; a percentage of the revenue actually received which is equal to the percentage of the work determined by the parties to be owned by the University will be distributed in accordance with Section B(2) above.

D. Student Works

(b)- Student Works that constitute notes of classroom and laboratory lectures and exercises shall not be used for commercial purposes by the student generating such notes.

VIII. Works subject to both copyright and patent protection.

Where an invention is thought to be subject to protection under both patent law and copyright law, if the University through the Office of Technology Development determines to retain title to its patent rights, the inventor/creator shall assign copyright to the University. On commercialization of such works, the inventor/creator shall be compensated in accordance with the provisions of the University of North Carolina Patent Policy and the UNC-CH Patent and Copyright Procedures. The Office of Technology Development may on its own initiative investigate whether a copyrighted work reported to it may also be subject to patent protection.

**CRITICAL QUESTIONS REGARDING
SCHOLARSHIPS AND STUDENT FINANCIAL AID
University of North Carolina at Chapel Hill
Academic Year 2006-07**

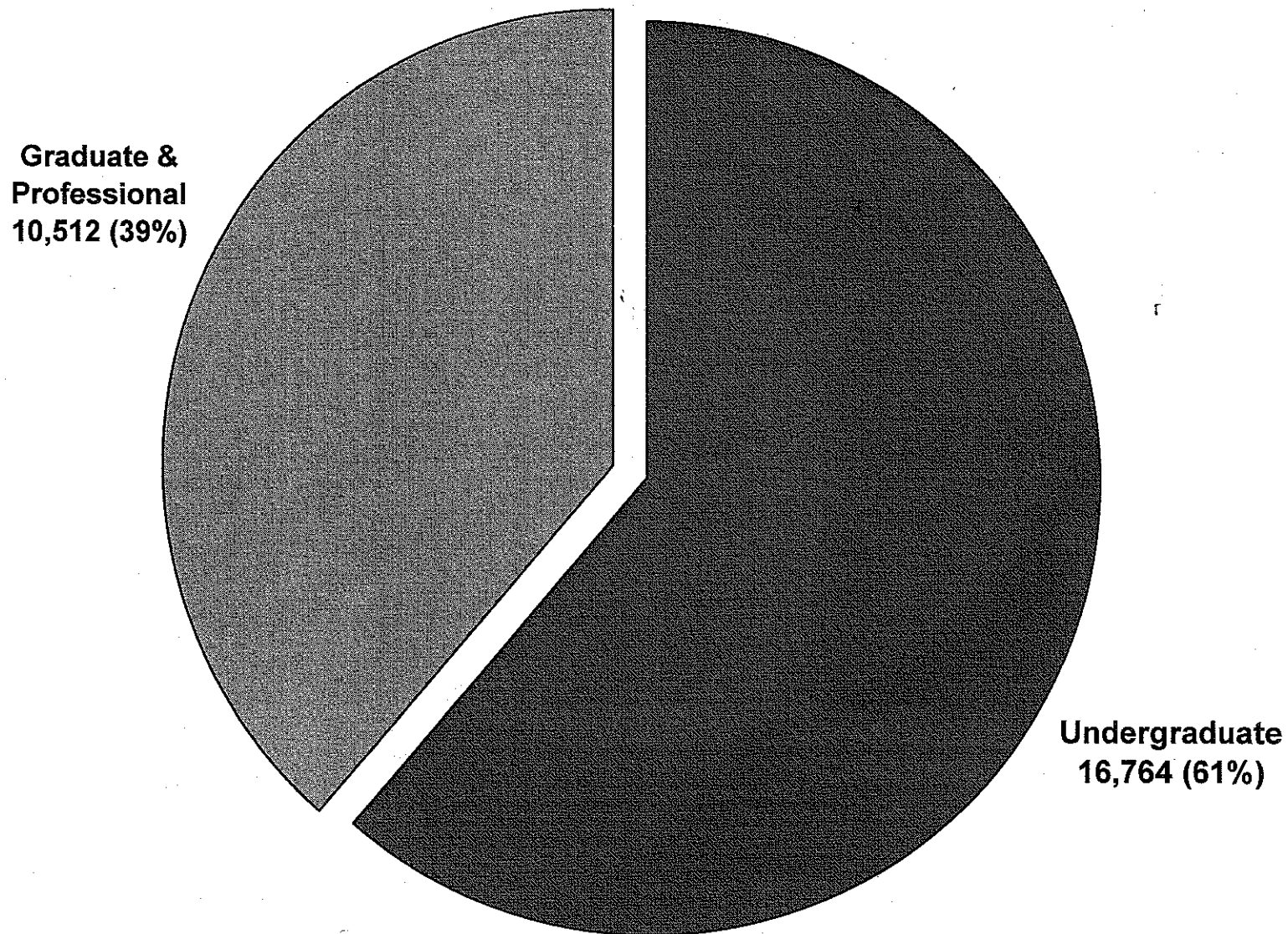
Need-based student financial aid provides access for students who, without such assistance, could not afford to attend the University. Merit-based aid recognizes and rewards student talent and promise and positions the University to compete for highest-achieving students, without regard to need. Both are important sources for the recruitment and retention of undergraduate and graduate/professional students at the University.

The Office of Scholarships and Student Aid, the Office of Institutional Research, and the Faculty Committee on Scholarships, Awards and Student Aid will continue to perform research and examine the following questions throughout the 2006-07 academic year:

Policy Questions Addressed:

1. How many more students will likely need financial aid under different enrollment growth scenarios, and in what types and amounts?
2. How will likely tuition and fee increases impact the need for additional grant aid, and for whom?
3. What is the impact of the Carolina Covenant™ on low-income student recruitment, performance, and retention?
4. What effect did the legislatively authorized "out-of-state full scholarship provision" have on the recruitment of high-achieving non-resident students?
5. How are graduate students funded, and how adequately are they served by institutional and federal programs?
6. How do students of all income levels pay for education at Carolina?
7. How are middle-income students faring at Carolina, given recent tuition increases?

Total UNC-CH Enrollment 2005-2006
27,276 Students



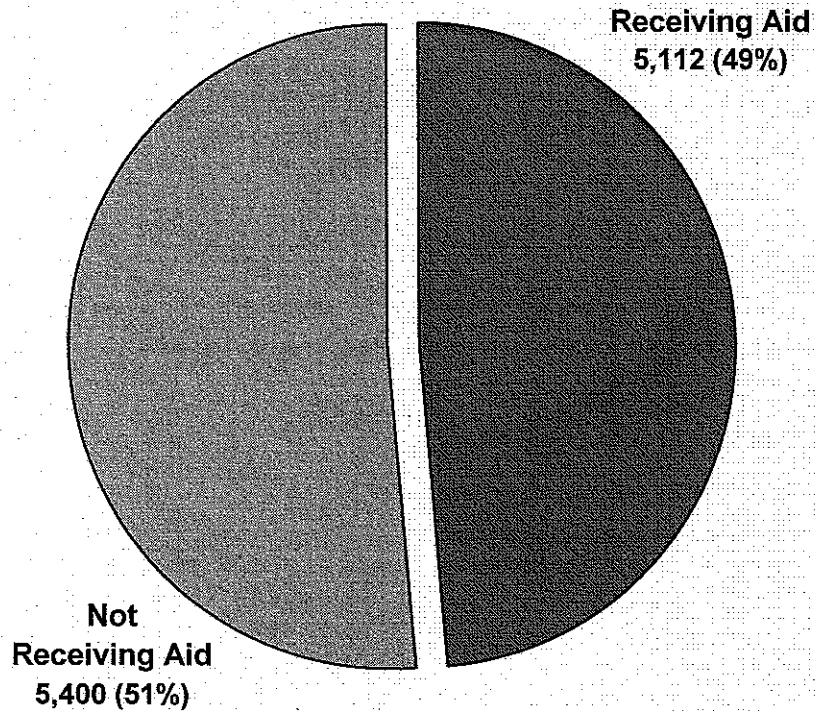
Percentages of Enrolled Students Receiving Any Aid in 2005-2006

Total Student Population = 27,276

Total Student Population Receiving Aid = 15,120 (55%)

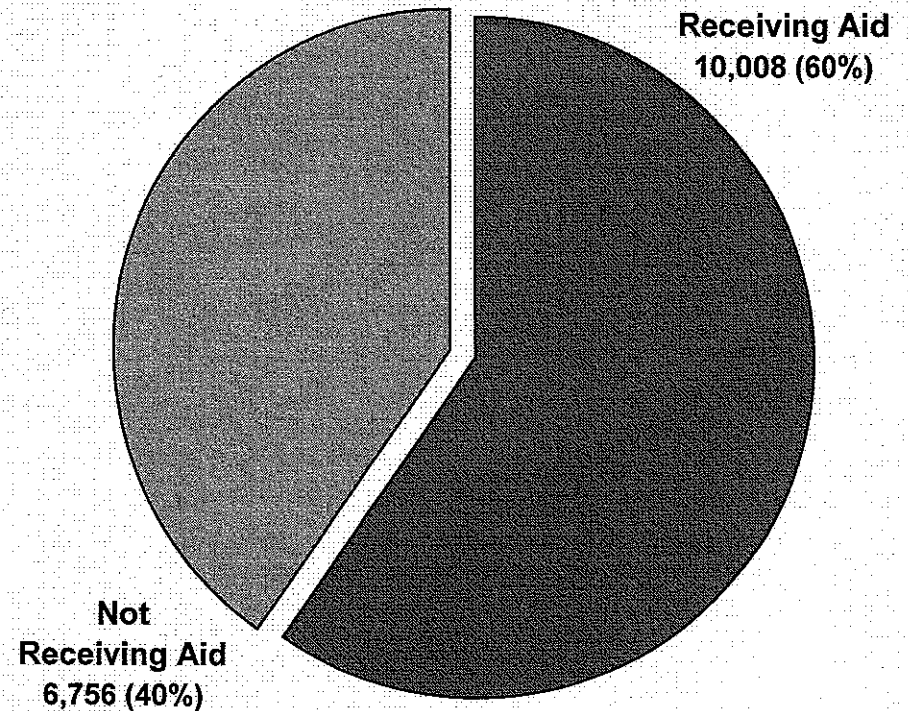
Percent of Enrolled Graduate & Professional Students Receiving Aid

Total Population of Graduate & Professional Students = 10,512

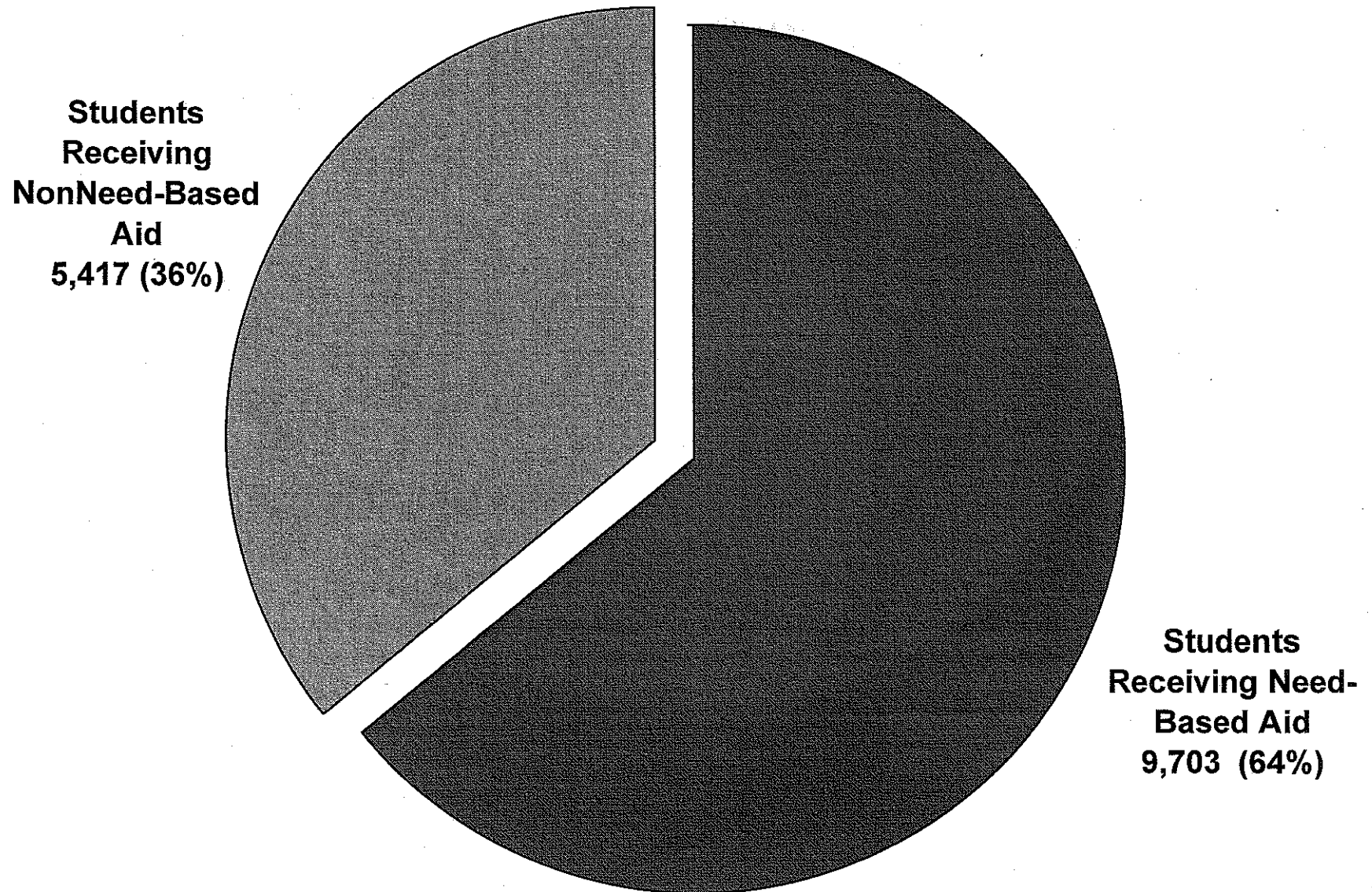


Percent of Enrolled Undergraduate Students Receiving Aid

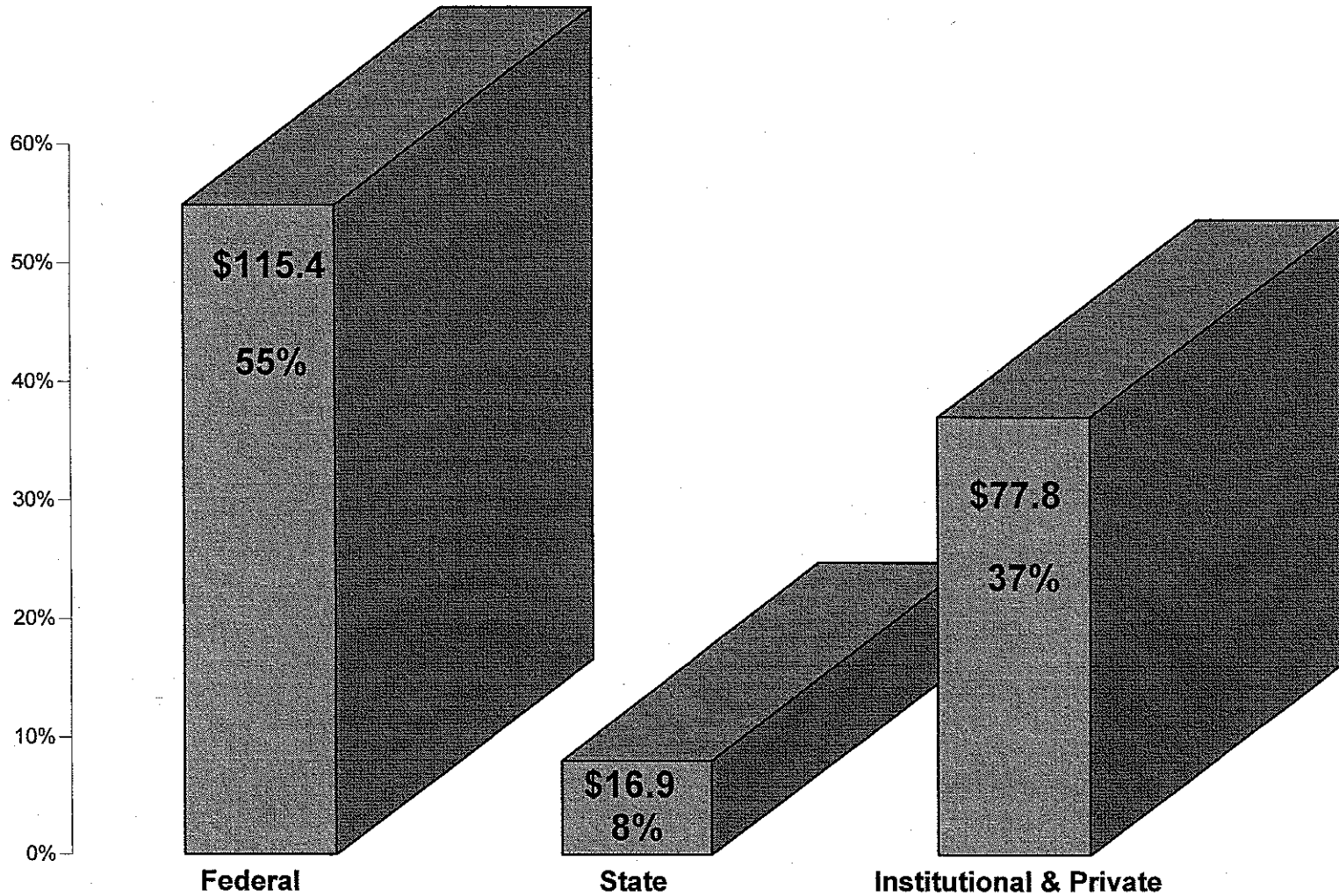
Total Population of Undergraduate Students = 16,764



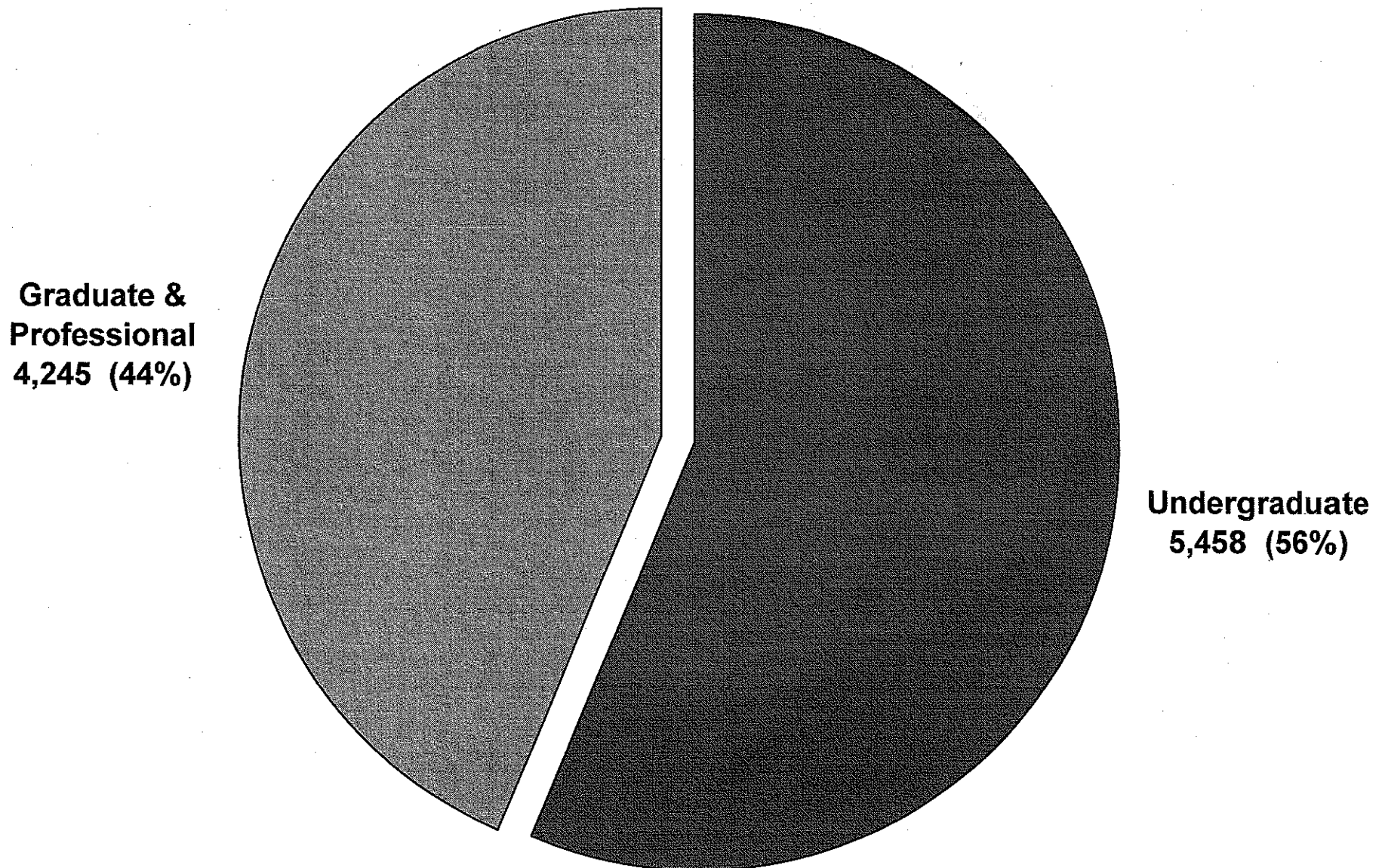
All Students Receiving Any Aid 2005-2006 15,120 Students



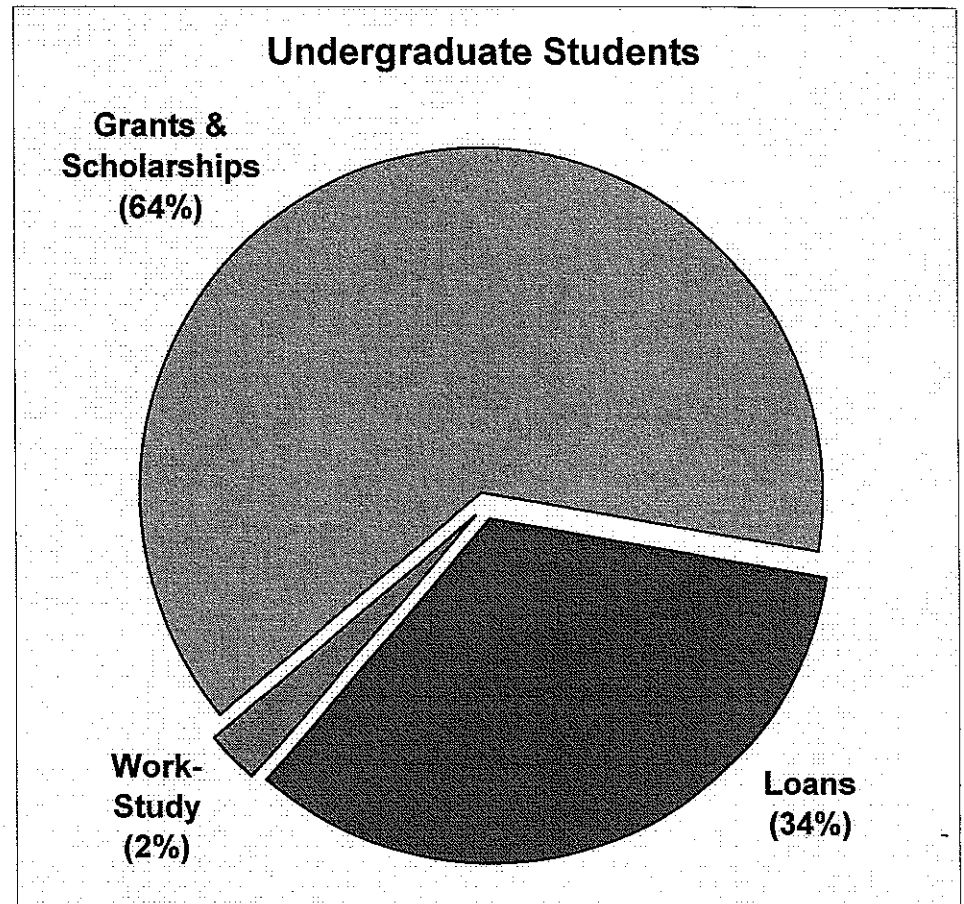
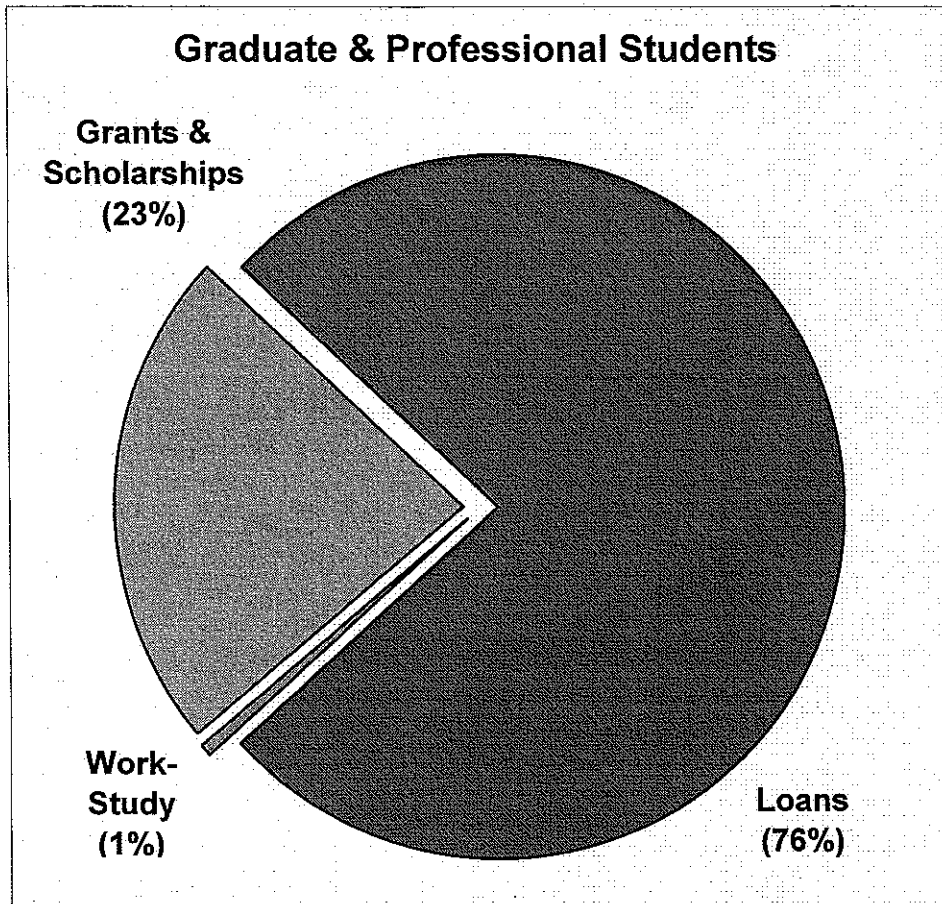
Total Aid Distributed to All Students, by Source 2005-2006, In Millions



**All Students Receiving Need-Based Aid 2005-2006
9,703 Students**



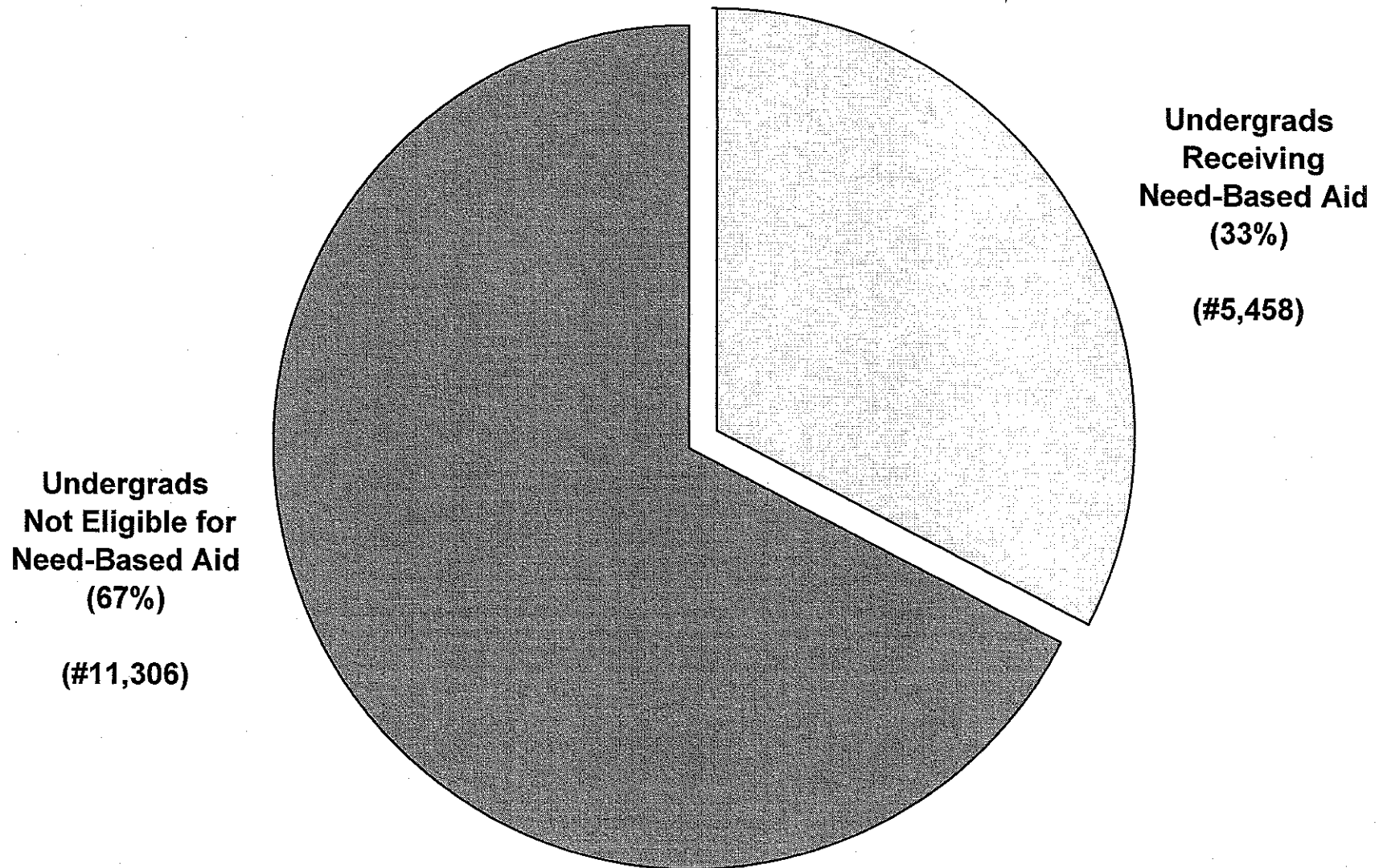
Need-Based Aid Distributed to Students, by Type 2005-2006



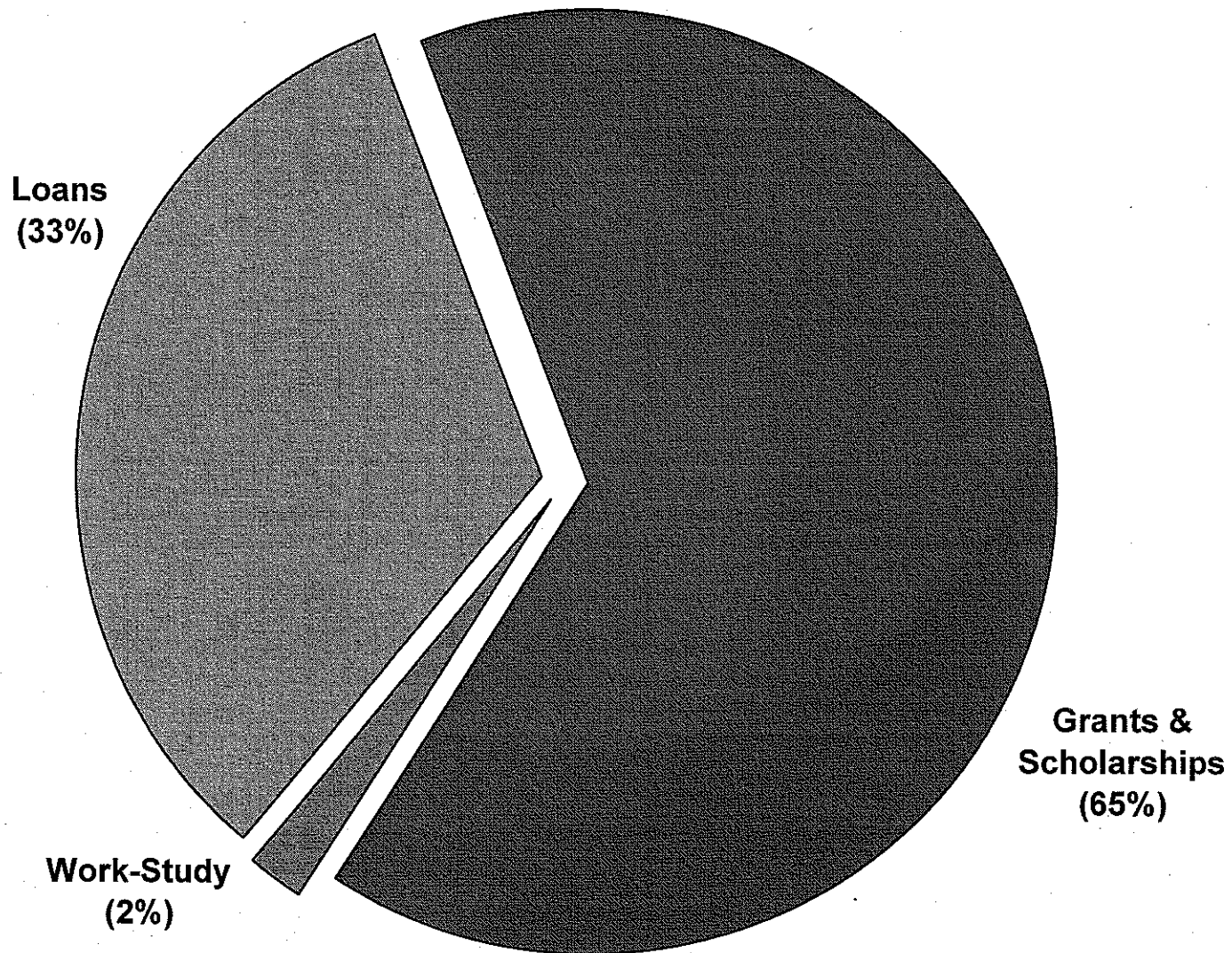
Percent of All Undergraduate Students Receiving Need-Based Aid 2005-2006

(includes resident and non-resident students)

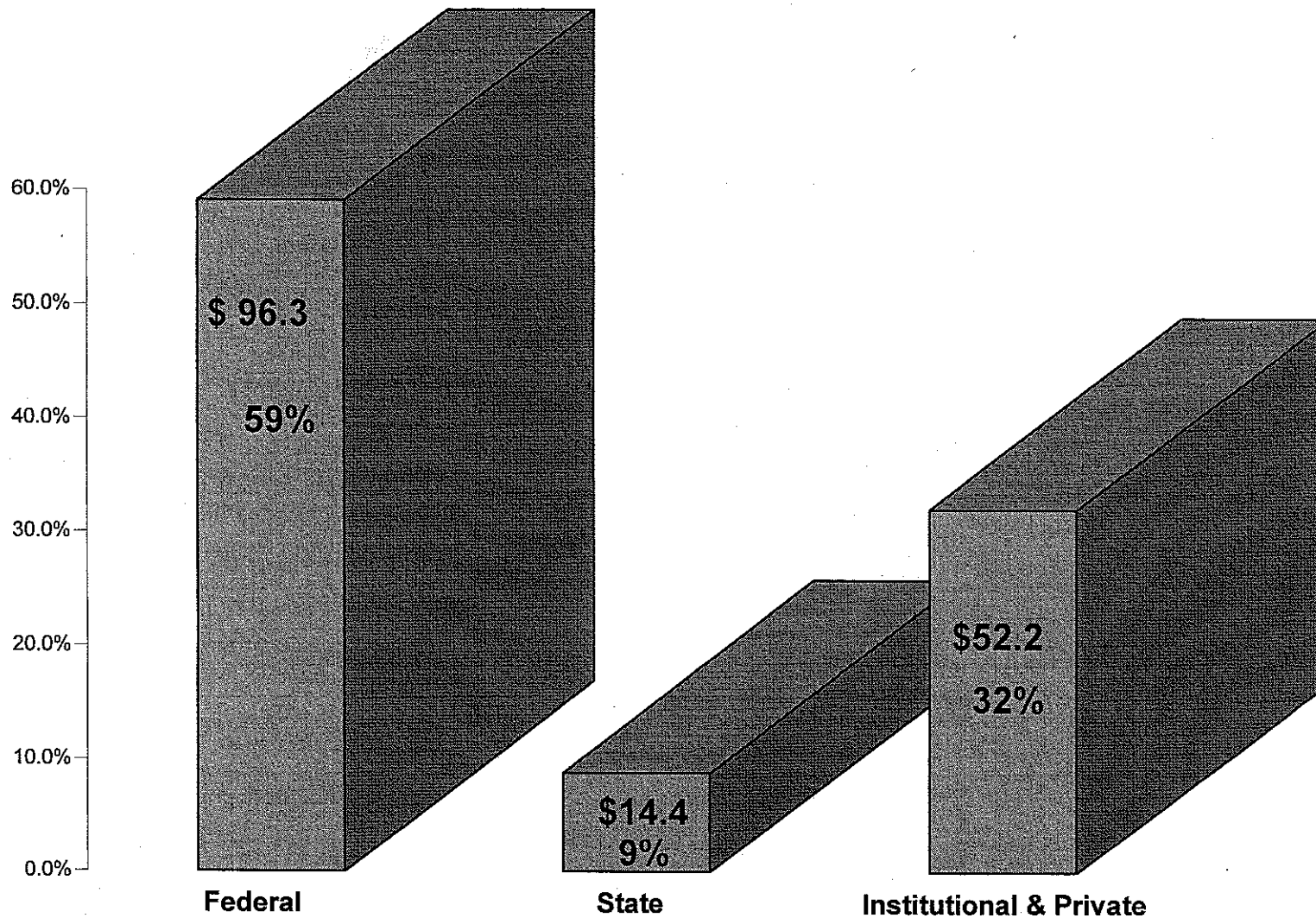
Total Undergraduate Enrollment = 16,764



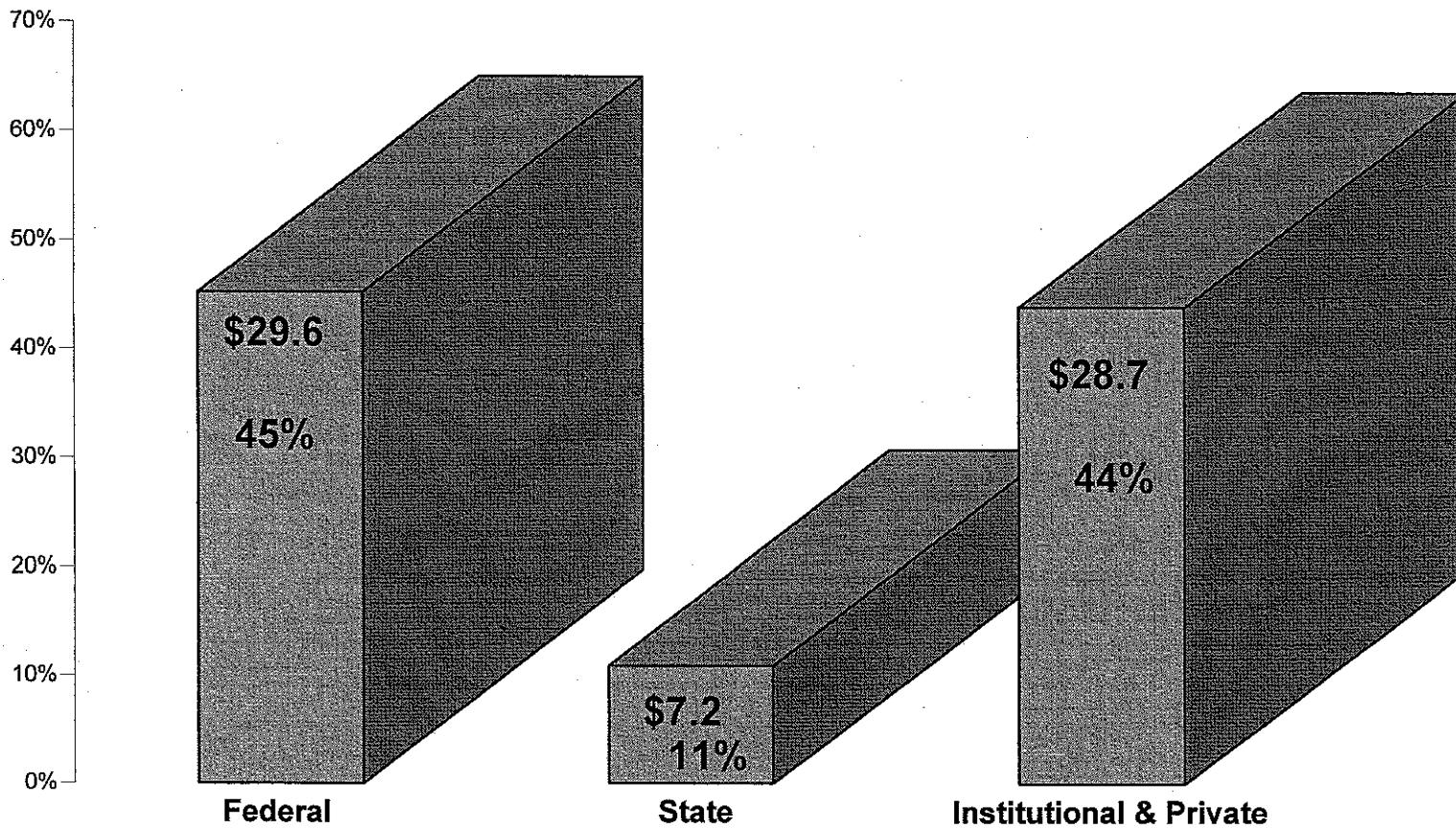
Typical Financial Aid Package for Aid-Eligible Freshman Applying By March 1st 2005-2006



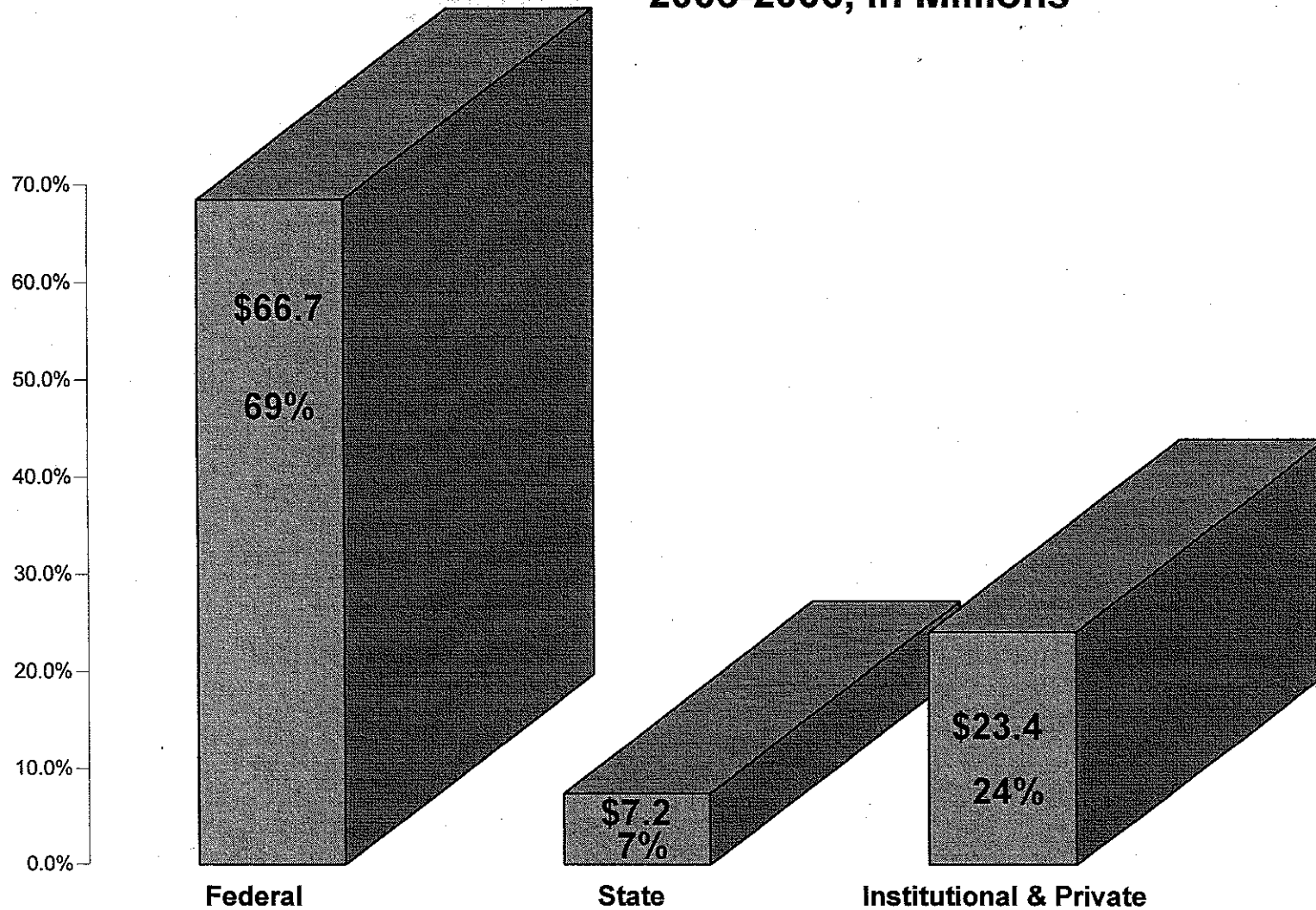
Need-Based Aid Distributed to All Students, by Source 2005-2006, In Millions



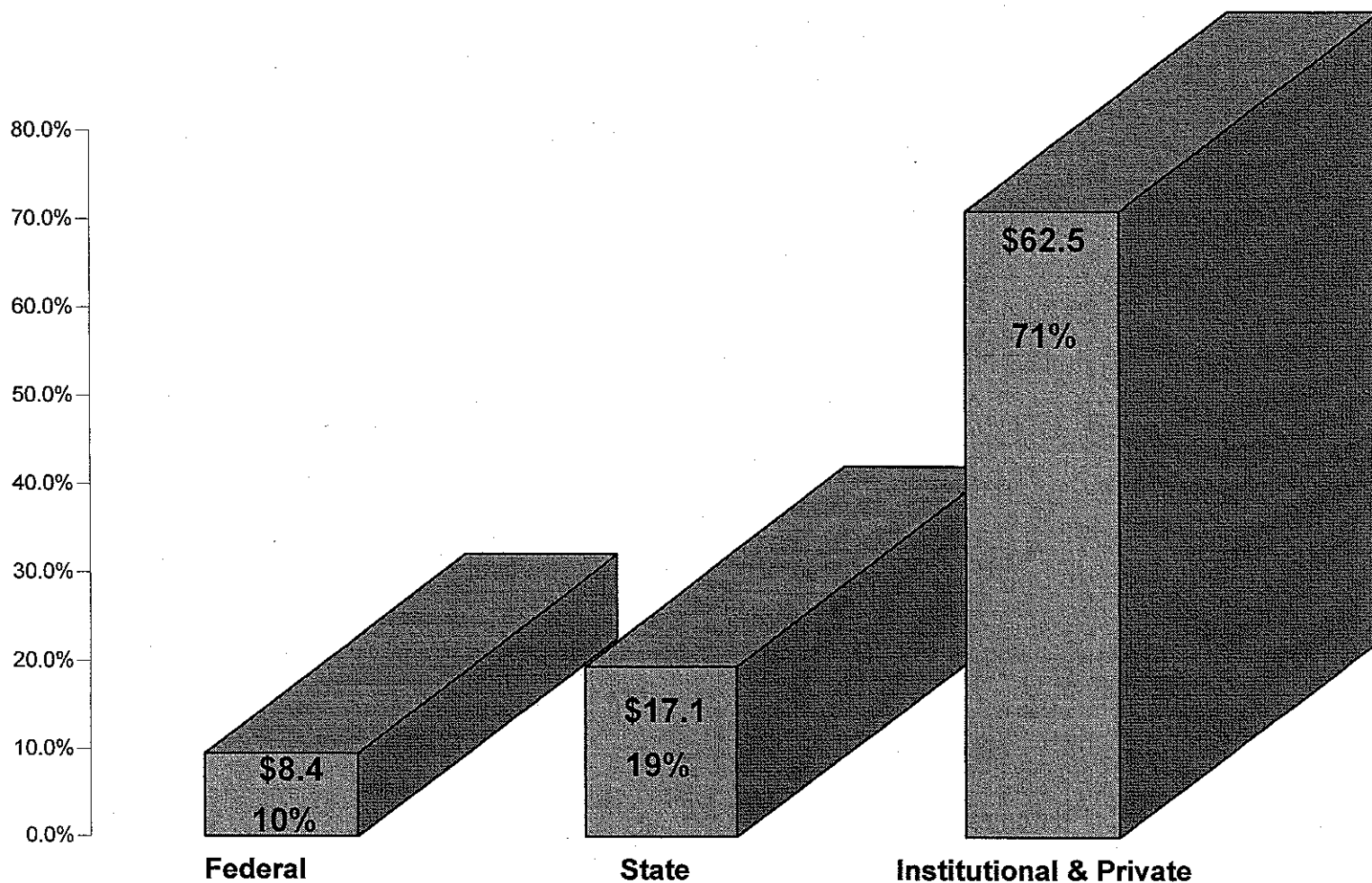
Need-Based Aid Distributed to Undergraduates, by Source 2005-2006, In Millions



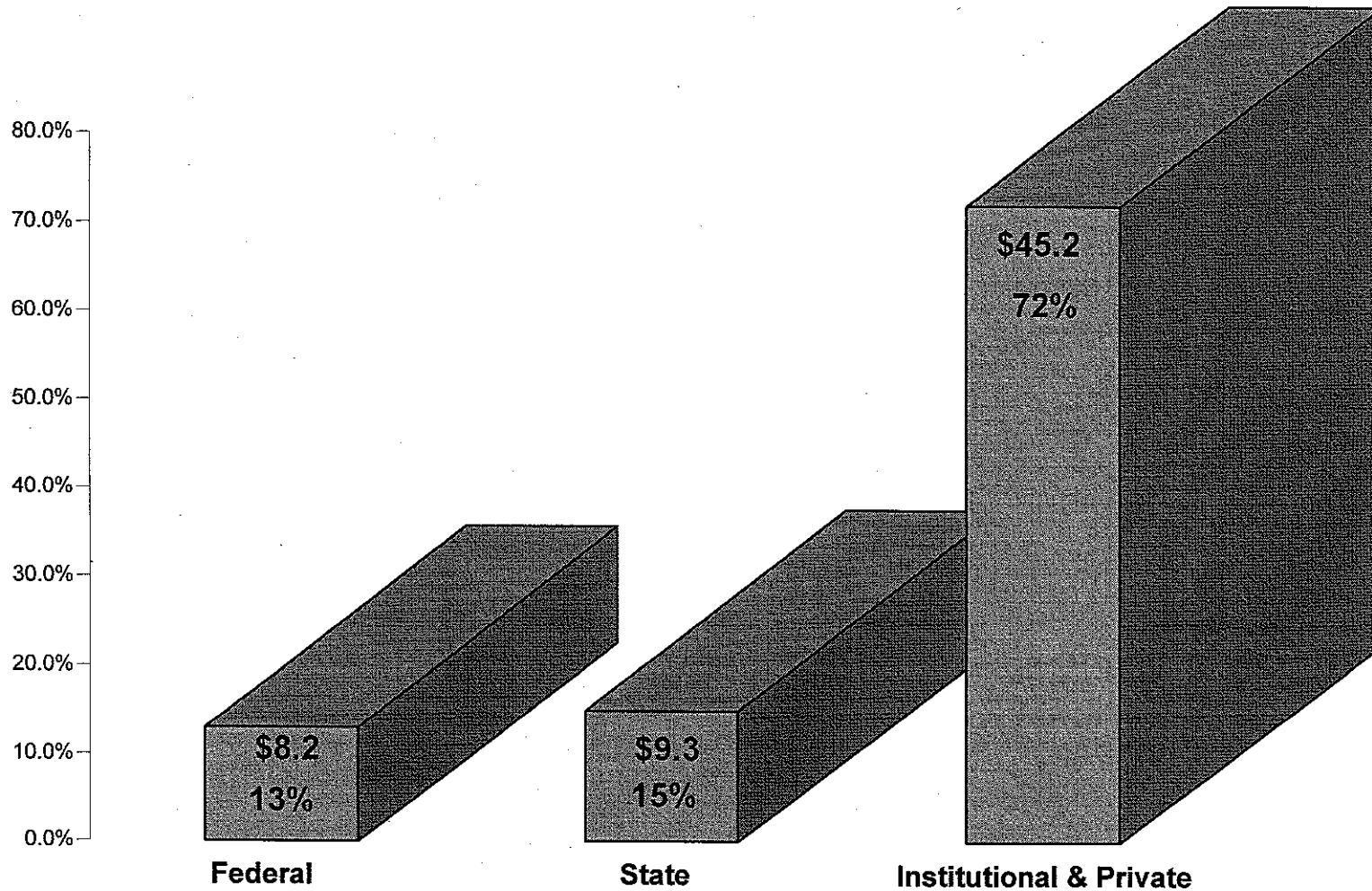
Need-Based Aid Distributed to Graduate/Professional Students, by Source 2005-2006, In Millions



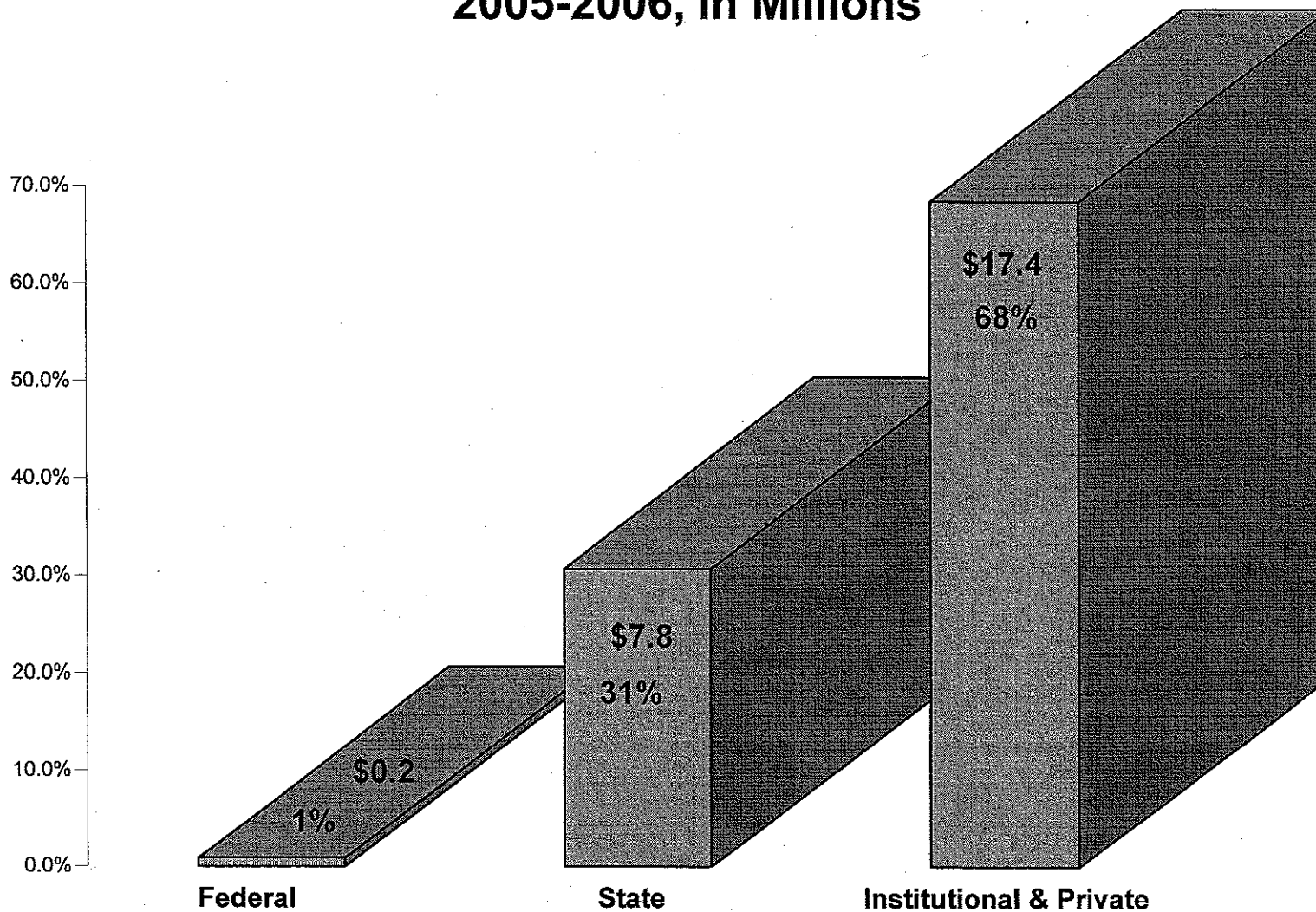
Gift Aid Distributed to All Students, by Source 2005-2006, In Millions



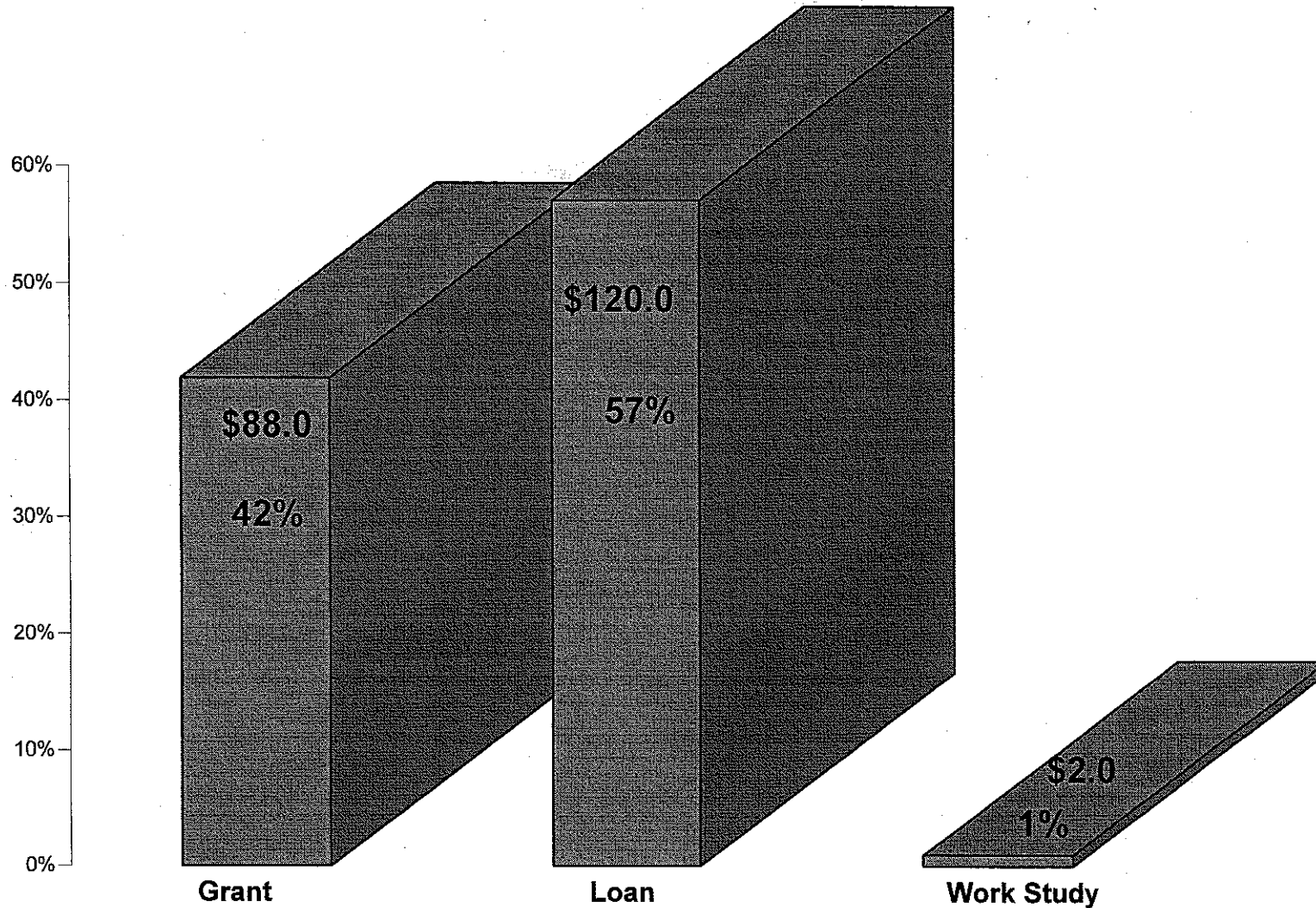
Gift Aid Distributed to Undergraduates, by Source 2005-2006, In Millions



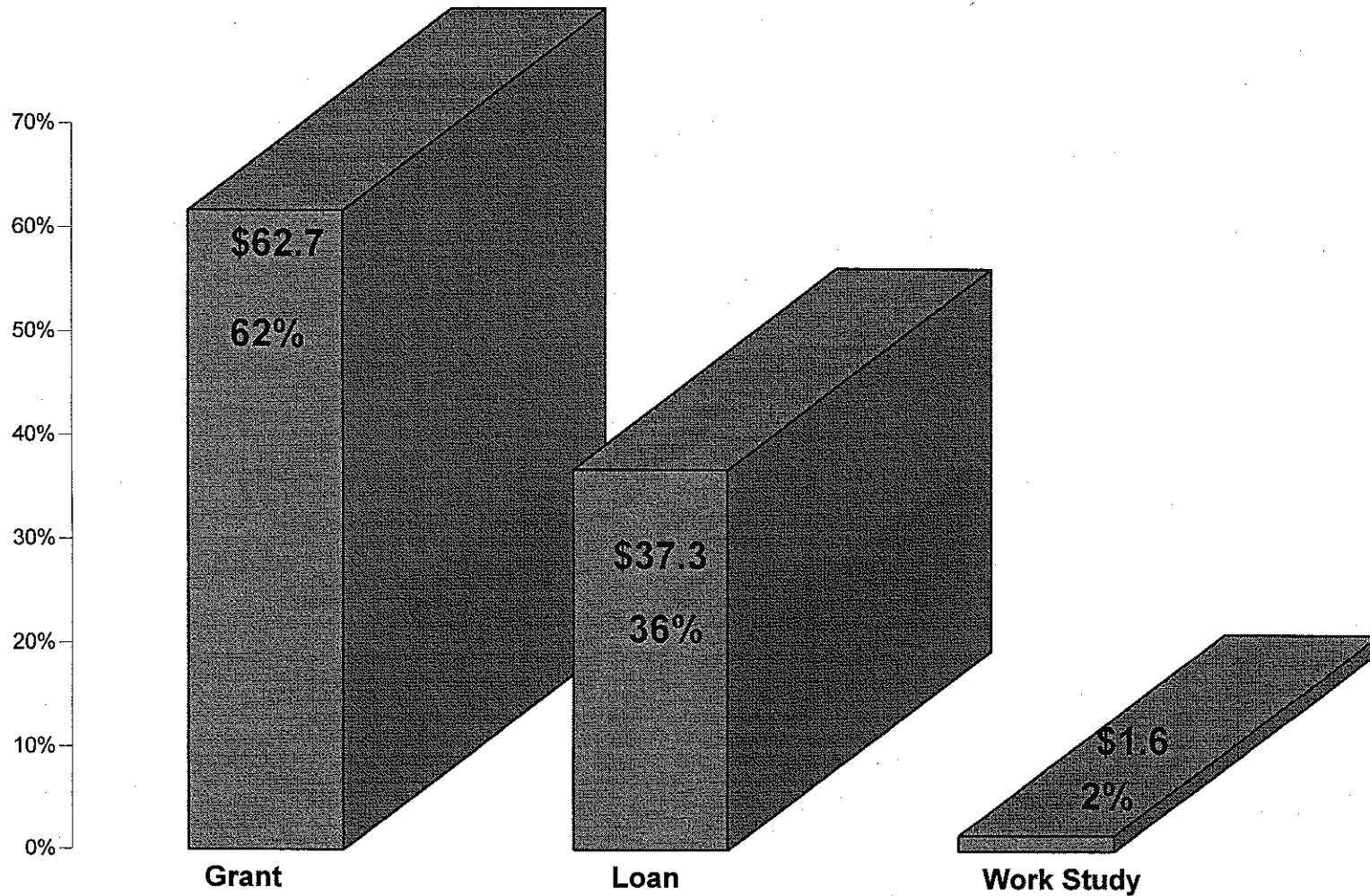
Gift Aid Distributed to Graduate/Professional Students, by Source 2005-2006, In Millions



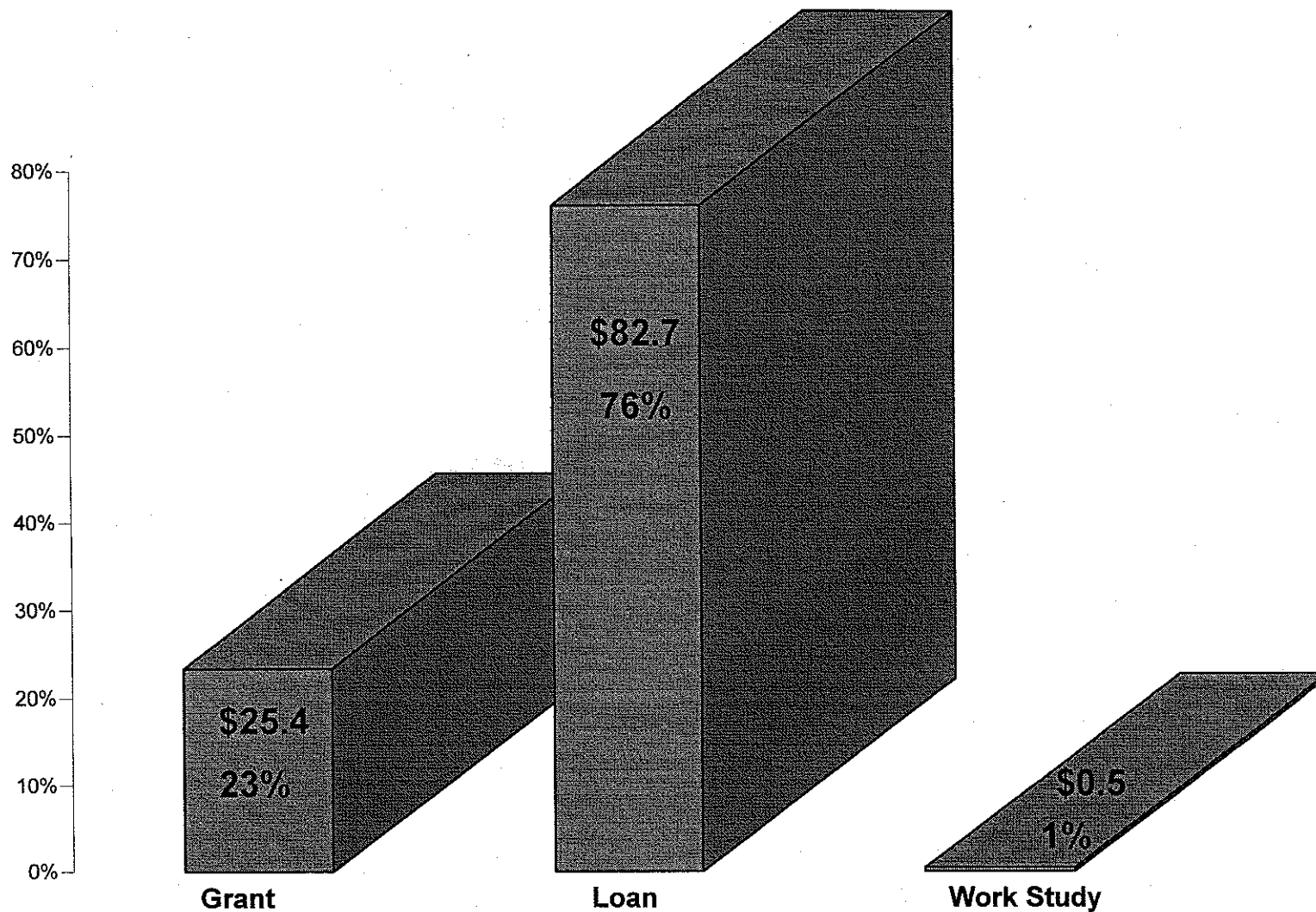
Total Aid Distributed to All Students, by Type 2005-2006, In Millions



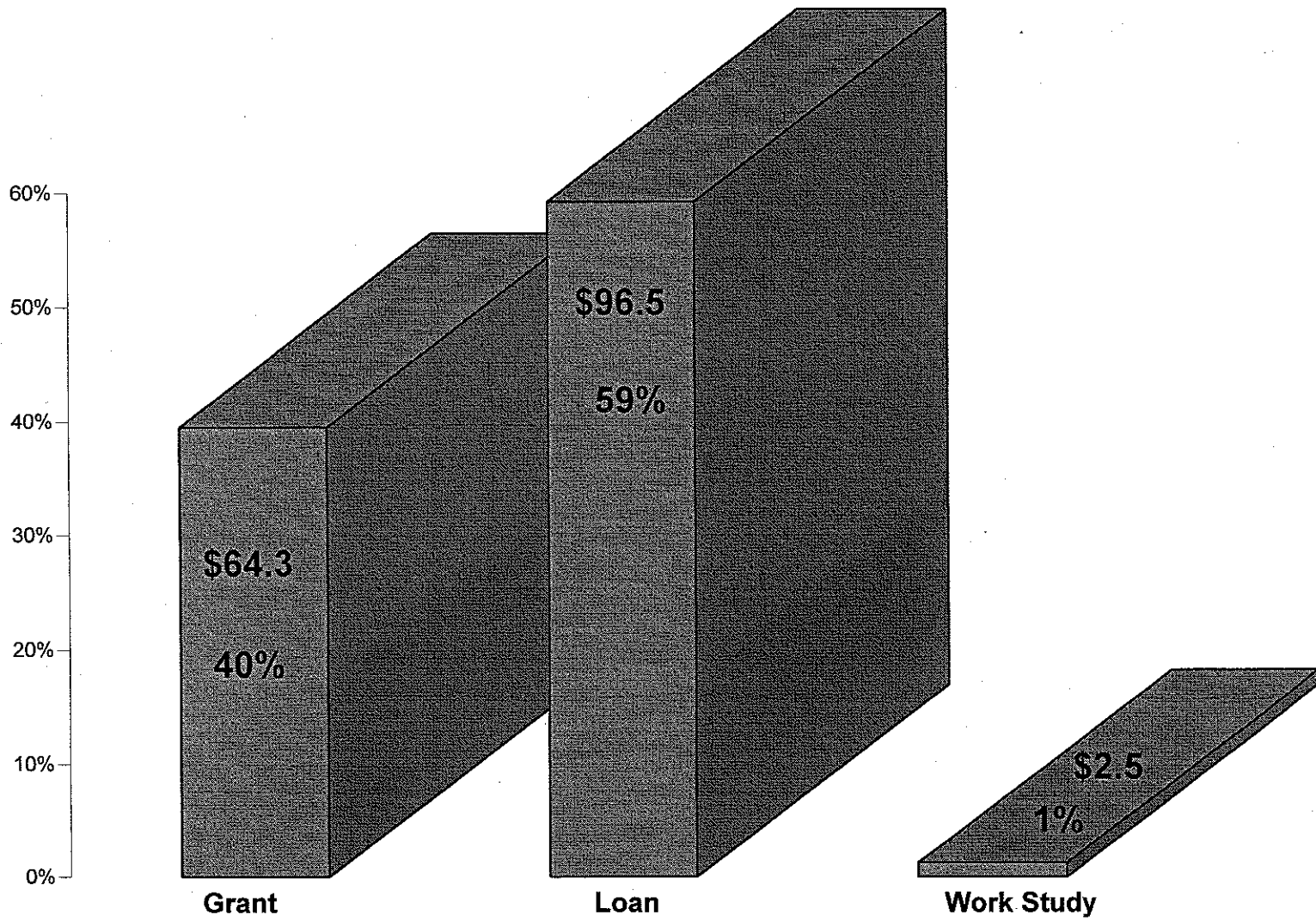
Total Aid Distributed to Undergraduate Students, by Type 2005-2006, In Millions



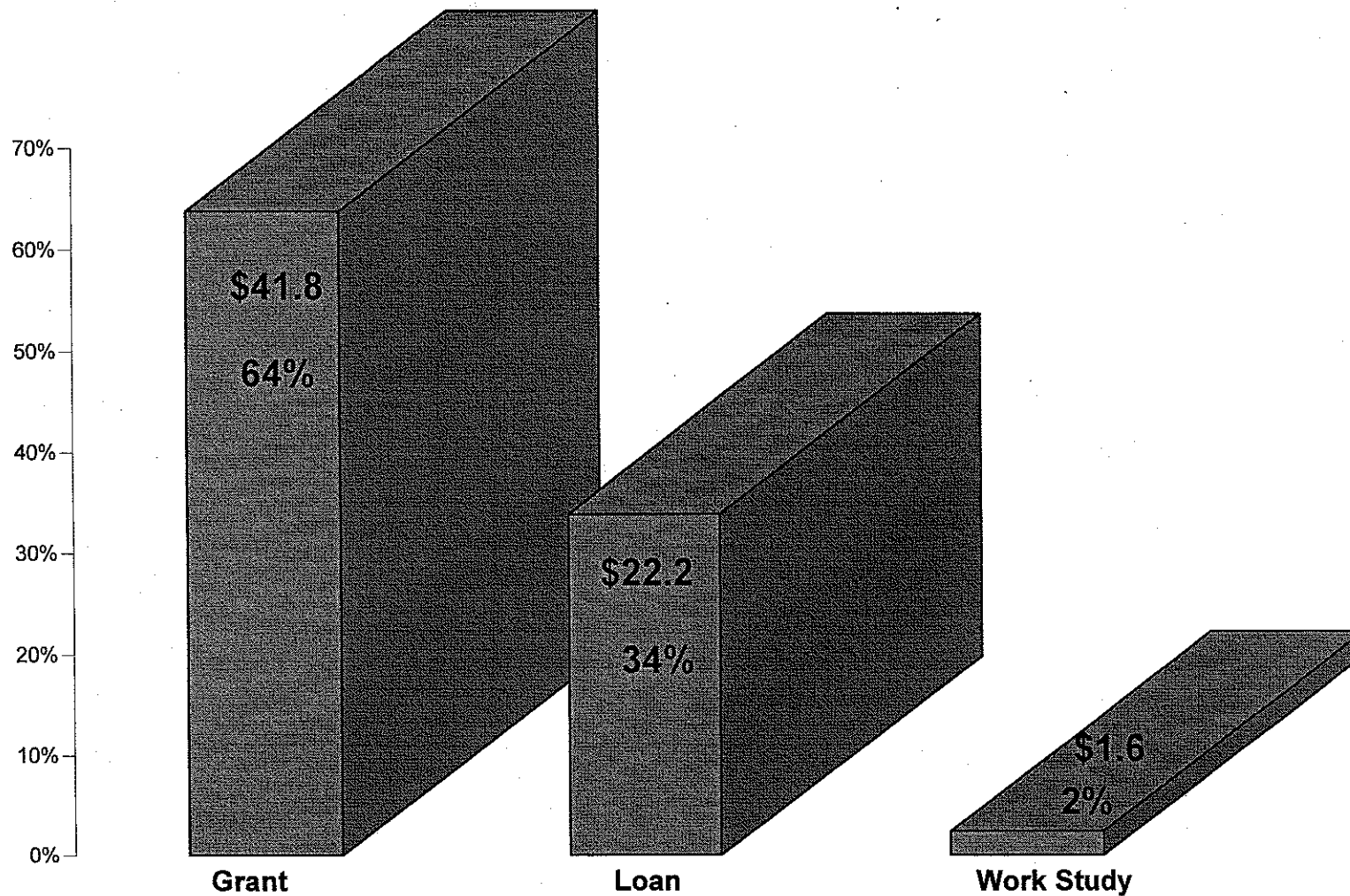
Total Aid Distributed to Graduate/Professional Students, by Type 2005-2006, In Millions



Need-Based Aid Distributed to All Students, by Type 2005-2006, In Millions



Need-Based Aid Distributed to Undergraduate Students, by Type 2005-2006, In Millions



Need-Based Aid Distributed to Graduate/Professional Students, by Type 2005-2006, In Millions

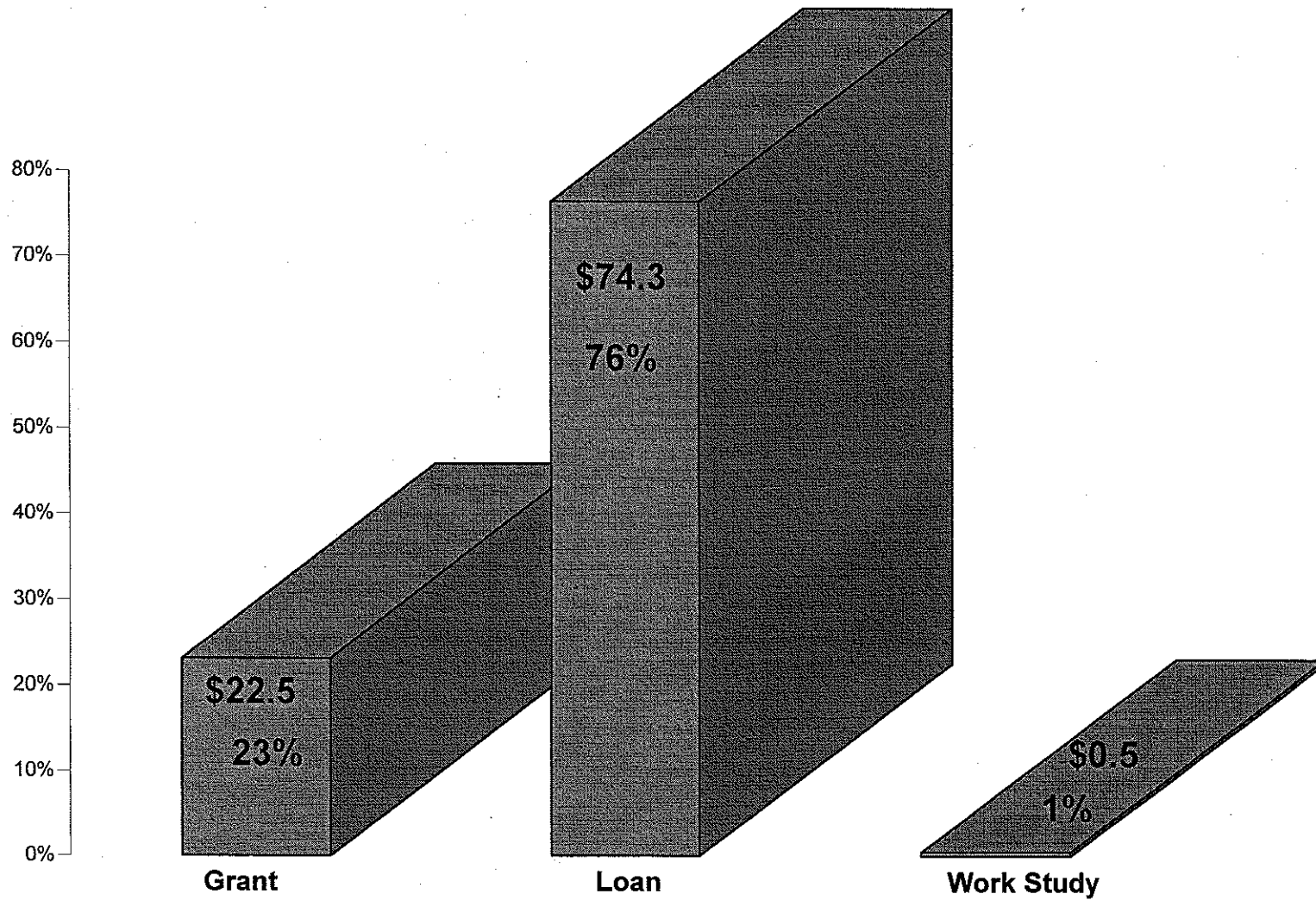


Chart 20

Note: 2005-06 GA Unit Record coding changed, which may cause variation from prior year report.
Office of Institutional Research and Assessment/Office of Scholarships and Student Aid
February 26 2007

Total: \$97.3 (in Millions)

Source Data for 2005-2006 Charts

2005-2006 UG Enrollment	61%	16,764
Students Awarded Aid	60%	10,008
Students Receiving Aid	60%	10,008
Students Not Receiving Aid		6,756
Students Receiving Need-Based Aid	55%	5,458
Students Receiving NonNeed-Based Aid	45%	4,550

27,276

Chart 8 Data Per Shirley

Loans	33%
Grants & Scholarships	65%
Work-Study	2%
	100%

11,306 <-UG Not receiving need-based aid

2005-2006 GR & PR Enrollment	39%	10,512
Students Awarded Aid		5,112
Students Receiving Aid		5,112
Students Not Receiving Aid		5,400
Students Receiving Need-Based Aid	83%	4,245
Students Receiving NonNeed-Based Aid	17%	867

All Students Receiving Aid	15,120	100%
Need-Based Aid	9,703	64%
NonNeed-Based Aid	5,417	36%

Undergraduate	61%	16,764
Graduate and Professional	39%	10,512

Ug	56%	5,458
GR	44%	4,245
	100%	9703

Not Receiving Aid	40%	6,756
UG Students Receiving Aid	60%	10,008
Need-Based Aid	55%	5,458
NonNeed-Based Aid	45%	4,550

Not Receiving Aid	51%	5,400
G & P Students Receiving Aid	49%	5,112
Need-Based Aid	83%	4,245
NonNeed-Based Aid	17%	867

Gr/PR			UG		
Total by Source of Aid			Total by Source of Aid		
Total Federal	66%	71,507,101	Total Federal	43%	43,867,603
Total State	7%	7,773,982	Total State	9%	9,110,565
Total Private/Inst	27%	29,222,398	Total Private/Inst	48%	48,601,056
Grand Total	100%	108,503,481	Grand Total	100%	101,579,224
Total by Type of Aid			Total by Type of Aid		
Total Grants/Schol	23%	25,358,853	Total Grants/Schol	62%	62,668,497
Total Loans	76%	82,670,785	Total Loans	37%	37,337,907
Total Work Study	0%	473,843	Total Work Study	2%	1,572,820

108,503,481

101,579,224

all students

Source Data for 2005-2006 Charts

Total by Source of Aid	Percent
Total Federal	55%
Total State	8%
Total Private/Inst	37%
Grand Total	100%

ug	grad	total
43,867,603	71,507,101	115,374,704
9,110,565	7,773,982	16,884,547
48,601,056	29,222,398	77,823,454
101,579,224	108,503,481	210,082,705

115.4
16.9
77.8

Total by Type of Aid	Percent
Total Grants/Schol	42%
Total Loans (incl. PLUS)	57%
Total Work Study	1%
Grand Total	100%

62%	ug	grad	total
	62,668,497	25,358,853	88,027,350
	37,337,907	82,670,785	120,008,692
	1,572,820	473,843	2,046,663
	101,579,224	108,503,481	210,082,705

ug	grad	total
62%	23%	42%
37%	76%	57%
2%	0%	1%

Total Federal Grant Aid	4%
Total State Scholarships/Grants	8%
Total Inst./Priv. Schol./Grants	30%
Total Federal Loans (Includes Plus)	50%
Total State Student Loans	0%
Total Other Student Loans	7%
Total Federal Work Study	1%
Total Aid Recived	100%

8,160,633	227,805	8,388,438
9,339,815	7,773,982	17,113,797
45,168,049	17,357,066	62,525,115
33,904,900	70,805,453	104,710,353
0	0	0
3,433,007	11,865,332	15,298,339
1,572,820	473,843	2,046,663
101,579,224	108,503,481	210,082,705

2005-2006 Enrollment	27,276
Students Awarded Aid	15,120
Students Received Aid	15,120

55%

	ug Gift aid by source	Grad/Prof Gift aid by source	Total Gift aid by source
Total Federal Grant Aid	13.0% 8,160,633	227,805 0.9%	8,388,438 9.5%
Total State Scholarships/Grants	14.9% 9,339,815	7,773,982 30.7%	17,113,797 19.4%
Total Inst./Priv. Schol./Grants	72.1% 45,168,049	17,357,066 68.4%	62,525,115 71.0%
Total	62,668,497	25,358,853	88,027,350

UG Needy Student Aid

Source Data for 2005-2006 Charts

	Residents				Non-Residents			
	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total Academic Year Cost	4498	14,270	64187921	n/a	960	27,959	26,840,237	n/a
Total Academic Year EFC	4498	4,928	22165397	n/a	960	10,593	10,169,113	n/a
Total Academic Year Need	4498	9,254	41624903	n/a	960	17,323	16,630,498	n/a
	Residents				Non-Residents			
	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total Federal Grant Aid	2,053	3,101	6,365,733	13.6%	291	3,389	986,253	5.2%
Total State Scholarships/Grants	2707	2,715	7,348,865	15.7%	13	3,019	39,252	0.2%
Total Inst./Priv. Schol./Grants	4,150	3,631	15,069,128	32.3%	951	12,595	11,978,394	63.7%
Total Federal Loans (Includes Plus)	2,855	5,539	15,815,253	33.9%	608	7,652	4,652,187	24.7%
Total Federal Loans (Excludes Plus)	2,785	5,008	13,947,109	29.9%	579	5,574	3,227,467	17.2%
Total Other Student Loans	220	3,856	848,337	1.8%	103	8,090	833,300	4.4%
Total Federal Work Study	701	1,785	1,250,995	2.7%	174	1,850	321,825	1.7%
Total Aid Received	4,498	10,382	46,698,311	100%	960	19,595	18,811,211	100%
	Residents				Non-Residents			
	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total by Source of Aid								
Total Federal	3,701	6,393	23,661,231	50.7	752	7,926	5,960,265	31.7
Total State	2,688	2,649	7,119,615	15.2	13	3,019	39,252	0.2
Total Private/Inst	4,181	3,807	15,917,465	34.1	956	13,401	12,811,694	68.1
Grand Total	4,498	10,382	46,698,311	100.0	960	19,595	18,811,211	100.0
	Residents				Non-Residents			
	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total by Type of Aid								
Total Grants/Schol	4,411	6,525	28,783,726	61.6	955	13,617	13,003,899	69.1
Total Loans	2,872	5,802	16,663,590	35.7	619	8,862	5,485,487	29.2
Total Work Study	701	1,785	1,250,995	2.7	174	1,850	321,825	1.7
Grand Total	4,498	10,382	46,698,311	100.0	960	19,595	18,811,211	100.0
UG								
Total Federal	3,701	6,393	23,661,231	50.7	752	7,926	5,960,265	31.7
Total State	2,688	2,649	7,119,615	15.2	13	3,019	39,252	0.2
Total Private/Inst	4,181	3,807	15,917,465	34.1	956	13,401	12,811,694	68.1
			\$46,698,311				\$18,811,211	
Total Federal	45%		\$29,621,496					
Total State	11%		\$7,158,867					
Total Private/Inst	44%		\$28,729,159					
Total	100%							

Total Aid for All Need Eligible Students

Total Federal	59.1%	\$96,317,829
Total State	8.8%	\$14,385,445
Total Private/Inst	32.0%	\$52,164,089
	100%	\$162,867,363

TOTAL ugONLY

Total Grants/Sch	64%	41,787,625
Total Loans	34%	22,149,077
Total Work Stud	2%	1,572,820

all	Type of aid	All	UG	Grad/prof	
64,332,816	Total Grants	40%	64%	23%	22,545,191
96,487,884	Total Loans	59%	34%	76%	74,338,807
2,046,663	Total Work Stud	1%	2%	0%	473,843

GR needy

Source Data for 2005-2006 Charts

	Residents				Non-Residents			
	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total Academic Year Cost	3,390	24,570	79,875,463	n/a	855	36,300	34,412,252	n/a
Total Academic Year EFC	3,390	3,753	12,202,307	n/a	855	4,013	3,804,605	n/a
Total Academic Year Need	3,390	20,793	67,596,700	n/a	855	32,244	30,567,227	n/a
	Residents				Non-Residents			
	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total Federal Grant Aid	42	3,137	131,744	0.2	7	4,579	32,050	0.1
Total State Scholarships/Grants	398	8,179	3,255,204	4.6	318	12,497	3,974,174	15.1
Total Inst./Priv. Schol./Grants	3,077	3,319	10,211,269	14.4	794	6,223	4,940,750	18.8
Total Federal Loans (Includes Plus)	3,111	17,297	53,812,059	75.8	725	16,888	12,243,837	46.5
Total Federal Loans (Excludes Plus)	3,111	17,287	53,780,459	75.7	724	16,843	12,194,181	46.3
Total Other Student Loans	346	9,519	3,293,593	4.6	249	20,037	4,989,318	19.0
Total Federal Work Study	35	9,491	332,189	0.5	15	9,444	141,654	0.5
Total Aid Received	3,390	20,955	71,036,058	100%	855	30,786	26,321,783	100%
	Residents				Non-Residents			
Total by Source of Aid	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total Federal	3,128	17,353	54,278,792	76.4	729	17,034	12,417,541	47.2
Total State	397	8,192	3,252,404	4.6	318	12,497	3,974,174	15.1
Total Private/Inst	3,097	4,361	13,504,862	19.0	811	1,244	9,930,068	37.7
Grand Total	3,390	20,955	71,036,058	100.0	855	30,786	26,321,783	100.0
	Residents				Non-Residents			
Total by Type of Aid	Number	Average	Amount	Percent	Number	Average	Amount	Percent
Total Grants/Schol	3115	4,365	13,598,217	19.1	796	11,240	8,946,974	34.0
Total Loans	3,119	18,309	57,105,652	80.4	732	23,543	17,233,155	65.5
Total Work Study	35	9,494	332,189	0.5	15	9,444	141,654	0.5
Grand Total	3,390	20,955	71,036,058	100.0	855	30,786	26,321,783	100.0

Total by Source of Aid	Percent
Total Federal	68.5%
Total State	7.4%
Total Private/Inst	24.1%
Grand Total	100.0%

66,696,333
7,226,578
23,434,930

**2005-06 SCHOLARSHIP AND FINANCIAL AID AWARDS
OFFICE OF SCHOLARSHIPS AND STUDENT AID
The University of North Carolina at Chapel Hill**

This report is a summary of all aid reported to or distributed by the Office of Scholarships and Student Aid to enrolled undergraduate, graduate, and professional students from July 1, 2005 to June 30, 2006.

Number of Awards	Amount of Awards
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AWARDS FROM UNIVERSITY-CONTROLLED SOURCES

Scholarships/Awards

University Funds Total 7,553 \$32,651,459

Johnston Award Programs Total (Need-Based)

James M. Johnston Scholarship	159	218	1,008,774	\$1,278,749
James M. Johnston Honor Award	25		24,500	
James M. Johnston Undergraduate Nursing Scholarship	12		87,475	
Johnston Graduate Nursing Scholarship	22		158,000	

Other Distinguished Scholarships (Need-Based)

Braswell Undergraduate Scholarship	25	174	85,900	\$694,426
Caroline & Thomas Royster Scholarship	30		144,770	
Fred Morrison Scholarship	47		156,018	
Herbert & Mayme Pegg Scholarship	27		90,719	
Josephus Daniels Scholarship	17		65,948	
Marvin Smith, Jr. Scholarship	7		49,000	
William Whitaker Scholarship	21		102,071	

Whitehead Scholarships (Need-Based)

Whitehead Dental Hygiene Scholarship	6	98	16,000	\$205,999
Whitehead Dental Scholarship	38		45,000	
Whitehead Nursing Scholarship	13		40,000	
Whitehead Pharmacy Scholarship	19		45,000	
Whitehead Physical Therapy Scholarship	9		25,000	
Whitehead Public Health Scholarship	13		34,999	

Academic Undergraduate Scholarships Total (Non-Need-Based)

College Fellows Awards

Ashtford-Ward Coll. Fellow Scholarship	4	629	10,000	\$7,500.00
Bruton College Fellowship	1	29	2,500	
Bowles College Fellow Scholarship	8		20,000	
Calhoun College Fellow Scholarship	2		5,000	
D. G. Coker Mem. College Fellow	1		2,500	
Davis College Fellow Scholarship	2		5,000	
Ferguson College Fellow Scholarship	1		7,500	
Macon County College Fellows Program	1		2,500	
Mason College Fellow Scholarship	1		2,500	
Richard Coker Coll. Fellows Award	1		2,500	
Seely College Fellow Scholarship	4		10,000	
Spencer College Fellow Scholarship	4		2,500	
Weil-Rosenthal College Fellows	1		5,000	
Joseph T. Pogue Scholarship	2		563,073	563,073.00
Funded through Student Stores (\$240,000)	77	77		

Carolina Scholars Awards

Alice H. Richards Carolina Scholars Award	0	156		1,541,478.00
Alumni Carolina Scholars Fund	0			
Blanche & Julian Robertson, Sr.	0			
Centre Holmberg Carolina Scholarship	4		60,000	
Chancellor's Carolina Scholarship	89		985,478	
Class of 1992 Carolina Scholars Award	1		7,500	
Earl Smith Carolina Scholarship Award	1		6,000	
Edward Smith Family Carolina Scholarship	8		60,000	
Elbert H. Denning Carolina Scholarship	2		15,000	
Elizabeth "Pepper" Dowd Carolina Scholarship	3		22,500	
Garnett Smith Carolina Scholar Award	0			

	Number of Awards	Amount of Awards
Gov. James & Dottie Martin Carolina Scholarship	1	7,500
Haywood & Frances Cochran Carolina Scholars Award	1	7,500
Hinkle Carolina Scholar Award	2	15,000
Hobbs Old Well	1	2,500
J. Harold Smith Carolina Scholarship	2	15,000
John G. B. Ellison Carolina Scholarship	1	7,500
Jordan Carolina Scholars Award	8	60,000
Kevin Reichardt Carolina Scholarship	1	15,000
Louis C. Stephens Carolina Scholars	1	15,000
Mary Adams Stephens Carolina Scholars	1	15,000
Maryland Carolina Scholarship	1	15,000
Mortsey-Dayvaul-Slater Car Scholars	1	7,500
RBC Centura Carolina Scholars Award	1	7,500
Robertson Carolina Scholarship	1	7,500
John Roughton Carolina Scholarship	1	7,500
Scott Carolina Scholar Award	2	15,000
Sewell Family Carolina Scholar	1	7,500
Shuford Carolina Scholars	1	7,500
Stallings Carolina Scholarship	1	7,500
Sue & Wilson Cooper Scholarship	1	7,500
Taylor Williams Carolina Scholarship	3	22,500
Uetschi Carolina Scholarship	0	
Whitaker Carolina Scholars Fund	1	7,500
William Lamont, Jr Carolina Scholar	1	7,500
William S. Jones Carolina Scholarship	2	15,000
Winstead Carolina Scholar Award	6	45,000
Woodruff Carolina Scholar Award	1	7,500
W. Roger Soles Carolina Scholar	4	30,000
Robertson Scholars Program		
William R. Davie Scholarship	65	1,537,361.00
Herbert W. Jackson Scholarship	132	825,750.00
Other Academic Scholarships	14	35,000.00
Adam Geer Scholarship	0	156
Ben Robinette Old Well Scholar	0	
Chewing-Wells Scholarship	2	5,000
Class of 1986 College Fellows	2	5,000
Coker-Fox Scholarship	14	68,000
Donald M. Jacobs Scholarship	1	25,000
Dr. Karley R. Varney Scholarship	1	1,836
Fred N. Kahn Old Well Scholars	1	2,500
General Alumni Association Scholarship	18	18,000
James R. Copland Scholarship	3	16,000
John Preiss Neal Memorial Scholarship	5	49,300
Josh Dornagen Old Well Scholar	4	10,000
Killian Family Old Well Scholars	1	2,500
Memphis Challenge Scholarship	0	
Morrison College Fellow Scholarship	8	40,000
Randall C. Berg Scholarship	1	14,254
Trademark Merit	30	375,000
University Trademark Academic Scholarship	1	17,500
University Trademark Merit Scholarship	7	217,500
W. Richard Peterson Memorial Scholarship	1	1,000
General Undergraduate Scholarships Total (Need-Based)		
Escheats Scholarships	12	12,890.00
Escheats Grant	6	8,327
Escheats Scholarship	6	4,563
Minority Presence Scholarships	98	138,030.00
Minority Presence Scholarship-I	98	138,030
Minority Presence Scholarship II	0	
North Carolina Scholarships	274	631,781.00
North Carolina Scholarship	274	631,781
Student Stores Scholarships	0	0.00
Student Stores Grant	0	
Student Stores Scholarship	0	
University Trademark Scholarships	299	1,123,601.00
University Trademark Grant	157	684,081
University Trademark Scholarship	142	439,520

\$4,838,039

	Number of Awards	Amount of Awards
Employee-Dependent Scholarships	90	603,528.00
Employee-Spouse-Dependent Scholarship	8	24,265
Employee Assistance Scholarship	82	579,273
Other General Scholarships	1,166	2,328,209.00
A. G. Glenn Memorial Scholarship	4	7,440
Advertising Women of New York	0	
Albert L. Herring Scholarship	6	17,180
Alfred Starling Scholarship	1	1,400
Allard Lowenstein Scholarship	0	
Aiston-Pleasant's Scholarship	1	2,500
Alton L. Bland Scholarship	12	33,830
Amex Foundation Scholarship	0	
Antia Buch Scholarship	1	2,000
Anna Maria Poulos Scholarship	1	1,000
Anne & Sidney Meyers Scholarship	3	13,660
Archie Christopher Scholarship	2	3,520
ARW Foundation Scholarship	0	
Atlanta Carolina Club Scholarship	5	2,500
Audrey Booth Scholarship	2	4,000
Bahr Scholarship	1	2,110
Baker, Lewis, Moody Scholarship	1	1,550
Barry Baker Scholarship	5	6,580
Bartholomew Moore Scholarship	6	14,440
Bay and Muse McCotter Scholarship	2	1,500
Becton Tannenbaum Scholarship	1	900
Benjamin & Mark Rodin Scholarship	3	4,200
Bill Guthridge Scholarship	1	2,000
Blue Ridge Carolina Club Scholarship	0	
Boone - Waynick Scholarship	2	3,100
Boston Area Carolina Club Scholarship	0	
Bradley R. King Scholarship	1	1,000
Bundy Scholarship	1	1,500
C. H. Morrison Scholarship	16	29,255
C. Knox Massey Scholarship	15	27,944
Cabarrus Rowan Carolina Club Scholarship	1	500
Carol Mathews Peeler Student Teacher Scholarship	1	2,038
Cannon Mills Scholarship	0	
Carole & Sam Roebuck Scholarship	5	9,440
Carolina Scholarship	1	950
Carolina Card Scholarship	1	200
Carolina Fund Scholarship (Renewal)	3	2,220
Carolina Fund Scholarship	0	
Carolina Student Fund Scholarship	1	2,590
Catherine and Joseph Messick Scholarship	1	1,000
Chad Overcash Scholarship	1	2,500
Charles Harrison Ray Scholarship	1	1,100
Charles S. King Scholarship	4	7,400
Charlotte & Dabney White Scholarship	2	4,520
Chi Omega Scholarship	4	8,000
Christopher Quackenbush Memorial Scholarship	1	1,500
Clarence Lamb Scholarship	1	1,000
Class of 1913 Scholarship	3	3,510
Class of 1925 Scholarship (Renewal)	5	4,208
Class of 1925 Scholarship	6	8,440
Class of 1986 Scholarship	1	1,428
Class of 1992 Carolina Scholarship	1	1,000
Claude Sutton Scholarship	12	14,171
Clyde & Rufus Stutts Scholarship	1	5,250
Col. Faucette Scholarship	2	755
Col. J. E. Morris Scholarship	1	1,500
Columbia S. C. Carolina Club Scholarship	0	
Conditional Spring Scholarship	0	
Cornelius Cathey Scholarship	2	1,080
Daisy M. Edmister Scholarship	3	3,734
Dallas/Fort Worth Carolina Club	1	500
David and Alma Corbett Scholarship	1	7,492
David & Elizabeth Reese Ward	1	7,500
David & Martha Edwards Scholarship	9	11,138

	Number of Awards	Amount of Awards
David C. Garvin Scholarship	3	3,000
David L. Stern Scholarship	0	
Dean Edwards Smith Scholar	6	3,000
Development Foundation Scholarship	0	
Donald F. Ray Scholarship	0	
Donald White Memorial Scholarship	2	19,366
Dot Ridenhour Royal Scholarship	4	3,000
Dr. A.P. & F. Dickson Scholarship	1	1,300
Dr. Joseph R. Blair Scholarship	3	4,160
Dr. Paul H. Wright Scholarship	2	2,500
Dr. Phillip & Betsey Davis Scholarship	47	172,261
Dr. Wm. Pritchard Scholarship	0	
Dr. Worth Daniels Scholarship	12	19,559
Drake Scholarship	2	7,474
E. Cecil Longest Scholarship	2	3,910
E. Russell White Scholarship	1	2,000
Edgecomb-Nash Carolina Club Scholars Award	0	
Edmond T. & Edwin L. Glenn Scholarship	1	1,450
Edna M. Smith Scholarship	4	11,000
Edward and Doris Patterson Schol	1	300
Edward G. Pringle Expendable Scholarship	1	3,020
Edwin Lanier Scholarship	1	200
Edythe/Kenneth Margerison Scholarship	1	100
Elbert H. Denning Scholarship	1	1,460
Elizabeth Jordan Scholarship	9	14,288
Ella Mae Daniel Proctor Award	0	
Eli T. Ullum Expendable Scholarship	3	4,231
Elmer & Doris Petree Scholarship	1	2,500
Elton B. Shore Scholarship	5	7,950
Endowed Scholarship	1	320
England Carolina Club Scholarship	0	
Eric & Patricia Fast Scholarship	3	12,500
Erik & Phyllis Larson Scholarship	7	8,220
Espthur E. Foster Scholarship	1	500
Eugene T. Barwick Scholarship	4	5,326
Eunice Morde Dot Scholarship	1	1,000
F. G. Await Scholarship	0	
Fairfield County Ct. Carolina Club Scholarship	0	
Fearrington Village Carolina Club Scholarship	2	1,000
Fletcher Industries Scholarship	1	2,210
Forsyth Carolina Club Scholarship	1	500
Francis E. Hill Scholarship	4	6,970
Francis J. Smith Scholarship	6	8,750
Frank S. Austell Memorial Scholarship	1	1,000
Franklin Hancock Scholarship	2	3,000
Fred B. James Scholarship	8	20,882
Fred G. Patterson Scholarship	1	1,200
Fred N. Kahn Scholarship	1	600
Garner Carteret County Scholarship	0	
Gaston County Carolina Club Scholarship	0	
General Scholarship	0	
George Graham Scholarship	1	750
George J. Koch Scholarship	3	4,390
George N. Toms Scholarship	3	6,554
Gimghoul Scholarship	0	
Grail-Valkyries Scholarship (Renewal)	11	10,000
Grail-Valkyries Scholarship	7	16,938
Grandfather Mtn. Club Scholarship	0	
Greensboro Alumni Chapter Scholarship	0	
Gustavo A. Fernandez Cuban Sch	0	
Guy B. Phillips Scholarship	0	
H. Allen Gant II Scholarship	0	
H. D. Strickland Scholarship	1	3,250
Hampton Roads Carolina Club Scholarship	1	2,500
Harriett Marks Scholarship	0	
Harriett Morrison Scholarship	5	4,680
Harry Davis Fund Scholarship	11	24,313
Hattie R. Wall Scholarship	1	1,000

	Number of Awards	Amount of Awards
Hearst Foundation Scholarship	0	
Helen & William Morris Scholarship	0	
Helen H. Hooper Scholarship	3	6,808
Henry Branch Scholarship	0	
Herring Spears Scholarship (Renewal)	3	10,042
Holderness/Elmore Schol.	8	7,270
Horace M. Dehart Scholarship	2	4,000
Ira Douglas Potter Scholarship	1	700
Ira W. Hine Scholarship	0	
Jack & Grace Silvers Scholarship	2	2,500
Jackson B. Hunt Scholarship	2	6,000
JADA Cheyenne Collins Scholarship	2	1,400
Jacob & Ruth Shrago Scholarship	5	1,050
Jagannathan Scholarship	6	8,990
Jake Wicker Scholarship	9	25,550
James & Mary Bryan Scholarship	1	1,000
James Earl Somers, MD Scholarship	0	
James Everhart Scholarship	1	3,000
James H. Maguire Scholarship	1	
James Lee Love Scholarship	0	
James William Pless Class of '45 Scholarship	1	4,700
Jayne Tilghman Scholarship	1	800
Janet Waido & Julia Hendren Scholarship	1	500
Jerry Thomas Snyder Scholarship	2	1,500
Jesse Gatlin, Jr. Scholarship	2	3,670
Jesse Wayne Evans Scholarship	1	1,000
Jim Barry Scholarship	2	1,270
Jim Highsmith Scholarship	3	5,080
Joan & Stanley Fox Scholarship	4	7,750
Joan S. Smith '43' Scholarship	3	3,656
Joanne B. Sgroso Scholarship	2	915
John C. Rose Scholarship	0	
John D. Currie Scholarship	1	1,000
John P. Gilbert Scholarship	4	6,749
John Partridge Scholarship	2	2,920
John Q. Gant Scholarship	1	650
John S. Bivens Scholarship	4	11,530
John W. Graham Scholarship	3	4,700
Jon P. Brady Scholarship	6	12,580
Juilber-Wrean Scholarship	2	4,800
Kate Pearsall Scholarship	4	15,000
Kenneth Murchison Scholarship	1	3,240
Kyser Humanities/Fine Arts Scholarship	2	2,250
Lake Norman Carolina Club Scholarship	1	3,500
Laszlo Birinyi Scholarship	0	
Laura West Mayer Scholarship	11	18,665
Lawrence & Martha Hoyle Scholarship	1	2,270
Lawrence Holt Scholarship	7	8,170
Leonard & Rozella Herring Scholarship	0	
Lewis A. Baker Scholarship	8	15,076
Lisa Jan Parker Scholarship	4	6,380
Lloyd & Lillian Brown Scholarship	1	500
Lofton L. Garner Scholarship	4	7,510
Lotte & Marvin Boykin Scholarship	0	
Louis & Betsy West Scholarship	27	56,025
Louise Blackman Tolletson Scholarship	6	11,278
Louisville Carolina Club Scholarship	12	40,626
Lucius P. & Evelyn C. Best Scholarship	0	
Luke & Vivian Stevens Scholarship	2	22,850
Malcolm M. Oates Scholarship	1	600
Margaret Burgwyn Scholarship	4	3,975
Margaret & Eugene Lear Scholarship	1	750
Margaret T. King Scholarship	1	2,000
Margaret T. Moses Scholarship	0	
Martha & Varina Mason Scholarship	1	1,300
Martin L. King, Jr. Scholarship	6	4,558
Marvin & Inez Stacy Scholarship	1	1,500
	14	27,482

	Number of Awards	Amount of Awards
Mary & Maurice Julian Scholarship	7	18,200
Mary K. Brown Scholarship	1	1,120
Mary Lou Hague Memorial Scholarship	2	6,000
Mary S. Speight Scholarship	4	7,878
Mary Shaw Expendable Scholarship	0	
Mary Townsend Parker Scholarship	2	3,000
Masssey Scholarship (Renewal)	10	8,275
Maurice V. Polk Scholarship	1	1,500
Max & Eva Griffin Scholarship	1	1,500
Max & Rachel Parker Scholarship	1	1,500
McIntosh Scholarship	1	1,600
Mecklenburg Carolina Club Scholarship	3	3,000
Meisenheimer Scholarship	2	6,000
Melville Rose Scholarship	2	6,000
Merton E. Simons Scholarship	1	1,500
Mewborne Scholarship	2	6,260
Michael Hooker Memorial Fund	4	9,616
Michael J. Peterson Scholarship	1	1,650
Mildred McCaskill Scholarship	3	3,645
Mitchell & Laura Ingram Scholarship	3	2,120
Mitchell Family Scholarship	1	5,000
Mittle Barnwell Scholarship	8	12,188
Mr. & Mrs. Edgar Farrell Scholarship	4	7,280
Mr. & Mrs. W. Y. Farrell Scholarship	1	1,750
Neal Stevens Scholarship	1	1,500
Nelson & Leigh Eddy Scholarship	52	126,881
Nelson Schwab Scholarship	2	4,000
New York-Richard Jenrette Scholarship	0	
Nicholson-Class of 1969 Scholarship	2	4,800
Nims Scholarship	4	16,075
Norton/Chappell Scholarship	0	
O'Grady & Fletcher Family Scholarship	1	9,000
Olin & Katherine B. Mouzon Memorial	5	5,208
Olive Greenwald Scholarship	1	2,500
Oliver & Billie Alphin Scholarship	2	4,802
Orange County Carolina Club	1	500
Orange/Durham Carolina Club Scholarship	1	500
Orlando UNC Alumni Scholarship	1	500
Oscar C. Vatz Scholarship	1	380
Oscar Rand Scholarship	4	9,540
Pacific West Cancer Scholarship	0	
Page-Parker Family Scholarship	2	3,680
Patsy Sifford Scholarship	2	3,500
Paul Harrell, Jr. Scholarship	0	
Pearl L. Cavlin Scholarship	118	174,374
Pearson Scholarship	2	3,170
Peat-Marwick-Mitchell Scholarship	0	
Perry Morrison Scholarship	2	2,250
Phillip & Kay Kannan Scholarship	1	1,500
Pine Tree Scholarship	1	2,310
Pitt County Carolina Club Scholarship	1	500
Presley Scholarship	1	5,000
Puget Sound Carolina Club Scholarship	1	500
Purulator Scholarship		
R.G.S. Davis Scholarship (Renewal)	2	2,000
Ralph B. Garrison Scholarship	2	5,080
Raye & Thurman Stallings Scholarship	2	5,840
Rhode Island Carolina Club	1	500
Richard Brooke Scholarship	6	67,795
Richard G. Farmer Scholarship		
Richmond Carolina Club	1	500
Robert A. Rapp Scholarship	1	500
Robert C. Davis Scholarship	1	500
Robert C. Davis Scholarship	2	3,280
Robert G. S. Davis Scholarship	4	8,168
Robert P. Miller, Jr. Scholarship	1	3,000
Robert S. Morris Scholarship	12	24,758
Robert W. Eaves Scholarship	2	2,100
Robert W. Long, Jr. Scholarship	1	1,200

	Number of Awards	Amount of Awards
Robert Dallas Brittain Scholarship	1	800
Robin B. Conrad Scholarship	1	725
Roger & Linda Perry Scholarship	1	4,890
Ronald B. Goodman Scholarship	1	1,500
Ronald R. Bagwell Scholarship	2	1,530
Rook Family Scholarship	5	9,630
Rose & Louis Kithner Scholarship	7	15,254
Roy Armstrong Scholarship	5	10,865
Royster Graduate Scholarship	1	10,000
Russel E. Twiford Scholarship	3	3,610
Ruth & Robert Coleman Scholarship	1	2,000
Sam & Mary Berman Scholarship	1	1,110
Scrapps-Howard Fdn. Scholarship	1	
SGA Turrentine	1	876
Shaffer Scholarship	5	11,520
Sherraton Chapel Hill Music Scholarship	2	1,900
Shirley Smith Roberts Scholarship	2	5,010
Simpson Family Scholarship	2	4,800
Slade & Hannah Crumpton Scholarship	3	7,214
Solomon Weil Scholarship	2	740
Sonja Stone Scholarship	6	30,000
Spainhour Scholarship (Renewal)	2	2,000
Spike Saunders Scholarship	1	3,100
Steinhauer-Mullins Scholarship	16	61,018
Stella O. Gray Scholarship	0	
Sternberger Scholarship (Renewal)	4	3,400
Sternberger Undergraduate Scholarship	4	11,820
Steven N. Guild Scholarship	2	3,960
Stonewall Jackson Scholarship	6	9,710
Strickland Scholarship	0	
Student General Assistance-Grt	5	2,130
Sullivan Scholarship	0	
Susan Wallace Scholarship	1	2,500
Suther Scholarship	0	
Sutton Scholarship (Renewal)	4	3,500
Suzi D Holdaway Memorial Scholarship	2	1,200
Syvia & Harry Schwartz Scholarship	0	
Tampa Bay Carolina Club Scholarship	1	3,000
Ted Dunne Memorial Scholarship	1	2,000
The Benzera Scholarship	5	5,828
The Morrison Scholarship Fund	3	5,180
Thomas & Kate Fonville Scholarship	7	12,160
Thomas & Lorena Coppie Scholarship	0	
Thomas Hickerson Scholarship	1	2,420
Thomas S. Kittrell Scholarship	0	
Thompson Composition Award	0	
Tiffany Fackrell Scholarship	1	1,600
Ti-Cities UNC Alumni Scholarship	0	
Turrentine Science Scholarship	1	732
Twin Rivers Carolina Club Scholarship	0	
University Women's Club Scholarship	1	2,000
V. & E. Campbell Scholarship	1	1,600
Vivian/Jim Gloria/Mike Wilson	1	1,890
Von Pelt Foundation Scholarship	3	4,180
W. M. & H. R. Horne Scholarship	47	85,948
Wade L. Cavin Renewable Scholarship	2	1,000
Wake County Carolina Club	1	1,000
Walter James Ratchford Sr Memorial	1	1,600
Walter Spainhour Scholarship	1	1,600
Walter W. King Scholarship	5	7,505
Wanda Chappell Scholarship	1	6,000
Washington DC Carolina Club Scholarship	2	1,000
Wayne & Ida Bowman Scholarship	1	1,500
Wayne County Carolina Club Scholarship	0	
Weil Teachers Scholarship	1	1,310
Wesley L. McKeithan Memorial Scholarship	0	
Wilbur Kutz Scholarship	0	
Wilkes-Allegriany-Ashe Scholarship	1	500

Number of Awards	Amount of Awards
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William & Carolyn Waddell Scholarship	1	1,100
William Bowman Scholarship	3	6,110
William Cochran Scholarship	0	
William I. Witkin Scholarship	1	12,380
William J. Hogan Scholarship	0	
William J. & Mary F. Blair Scholarship	1	1,000
William M. Geer Scholarship	5	14,380
William P. Miller Scholarship	2	3,090
William Way, Jr. Scholarship	4	5,520
Winkler Memorial Scholarship	8	50,110
Winkler Scholarship (Renewal)	0	
Witkin Scholarship (Renewal)	2	1,732
Wm. & Ella Turrentine Scholarship	52	88,499

Restricted Scholarships (Non-Need-Based)

Avalon Bay Scholarship	2	12,500	78	\$534,106
Ballou Family Scholarship	1	5,006		
Barbee Scholarship	1	1,200		
Blanchard	60	447,000		
Bosnia Students Fund	0			
C. A. Meisenheimer				
Harvey Beech Scholarship	3	4,500		
Klingentfus Scholarship	0			
N. C. Math Contest Scholarship	0			
N. C. Writing Award Scholarship	0			
Student Stores Endowed Scholarship	9	55,000		
Victor S. Bryant Scholarship	1	1,000		
Von Beckerath Scholarship	1	2,500		
Wallace R. Peppers Award	1	400		
Willie H. Kennedy Scholarship	1	5,000		

Departmental Undergrad Scholarships Total (Primarily Non-Need-Based)

Art	6	5,800.00	\$593,024
Jonathan E. Sharpe Scholarship	3	4,000	
Kachergis Studio Art Scholarship	2	1,200	
Julian Fellowship in Design	1	600	

Business Administration

Baldridge Business Scholarship	0		76	84,872.00
Braxton Barrett Business Scholarship	5	5,000		
Brown Academic Business Scholarship	0			
Business Scholarships	0			
Durham Scholars Award	3	17,572		
E. & J. Cass Business Scholarship	0			
E. J. Sapp Business Scholarship	0			
Gene Clark Memorial Scholarship	0			
H. Kelly Landis III Study Abroad	4	4,000		
Helen Wardlaw Business Scholarship	0			
Holland Business Scholarship	1	1,000		
ITT Business Scholarship	0			
James K. McLean Scholarship	37	28,400		
Kenan-Flagler Business Scholarship	0			
Patterson BSBA Study Abroad	8	5,800		
T. N. Norwood Business Scholarship	0			
Troy Smith	10	5,000		
Undergraduate Business Scholarship	2	2,500		
William G. Daughtridge, Jr. Study Abroad	1	600		
Winslow Business Scholarship	0			
W. M. Rawls Business Scholarship	4	12,000		
W. R. Ludwick Business Scholarship	1	3,000		

Chemistry

Chemistry Undergraduate Scholarship	0		4	7,250.00
Chemistry Undergraduate Scholarship	0			
R. Davis Chemistry Scholarship	3	6,750		
Tanya Ellison Scholarship	1	500		

Computer Science

Charles Durham (Computer Science) Scholarship	0		0	0.00
Clinical Laboratory Science			3	6,000.00
Louise Ward Scholarship (Clinical Lab Science)	3	6,000		

	Number of Awards	Amount of Awards
Drama	25	28,528.00
Adler Scholarship-Dramatic Art	3	3,300
Andy & Cindi Griffith Scholarship	8	5,250
Frederick Koch Scholarship	2	2,800
George Grizzard Scholarship	1	8,478
Joseph D. Feldman Scholarship	6	3,000
Laura Jewell Dobbins Scholarship	0	
Louise Lamont Endowment	0	
Paul & Elizabeth Green Scholarship	0	
Rains Scholarship-Dramatic Art	0	
Selden Memorial Scholarship	4	4,000
Strudwick Scholarship	1	1,700
Wes Egan Scholarship	0	
Education	1	26,559.00
Charles S. Templeton Scholarship	1	23,354
Frank R. Comfort Scholarship	1	3,205
School of Education Scholarship	0	
English	4	100,916.00
Thomas Wolfe Scholarship	4	100,916
Geology	1	300.00
Op White Memorial Scholarship	1	300
History	11	17,277.00
Chair of History Scholarship	11	15,477
Nixon History Scholarship	1	1,800
International Studies	2	3,750.00
Eli T. Ullum Scholarship (International Studies)	2	3,750
Journalism	54	104,000.00
Journalism Scholarship	54	91,500
Quincy S. Mills Scholarship	5	12,500
Leisure Studies	0	0.00
Douglas Sessoms Scholarship	0	
K. Bryant Recreation Scholarship	0	
Mathematics	1	2,000.00
Lottie Wilson Scholarship	1	2,000
Music	116	130,800.00
Adler Scholarship in Music	11	4,675
Andy & Cindi Griffith Music Scholarship	8	6,250
Benjamin Swain Orchestra Scholarship	1	1,000
Dowd Music Scholarship	20	24,500
Eric Schwarz Music Scholarship	10	8,650
Fischer Music Scholarship	10	8,225
Fletcher Fdn. Music Scholarship	6	10,750
Hamrick Band Scholarship	7	6,500
James M. Barham Scholarship	4	2,000
Jarret and Newton FISC Orchestra Scholarship	2	1,250
Kay Kyser Undergraduate Jazz Scholarship	6	8,250
Lisa Fields Scholarship	1	1,000
Lisa Fields Scholarship	1	750
Music Scholarship	1	750
Paisley Scott Music Scholarship	0	
Sedberry Music Scholarship	4	4,000
Sigma Alpha Iota Music Scholarship	1	1,000
Thomas Kenan III Vocal Performance	5	20,000
Tony McDowell Schol-Vocal Performance	2	3,000
UNC Band Scholarship	0	
Village Orchestra Music Scholarship	2	1,750
Vollmer Music Scholarship	10	14,000
Woodward Music Scholarship	5	3,250
Nursing	30	73,472.00
African Nursing Scholarship	1	1,560
Alexandra Beebe BSN Class of '74 Scholarship	0	
Alice Leora Waalkes Scholarship	1	2,000
Ann P. Trowbridge Nursing Scholarship	0	
Burlington Ind. Nursing Scholarship	0	
Carol Blackwell Nursing Scholarship	1	3,300
Corra Pitts Barbee Scholarship	12	29,500
Daniel Nursing Scholarship	4	12,280
Frances Ader Read Nursing Scholarship	1	2,000
Glireath Nursing Scholarship	3	5,650

	Number of Awards	Amount of Awards	
Heleen Fuld Scholarship	0		
Martha H. Windham Scholarship	2	3,682	
Mona Currie Nursing Scholarship	4	11,000	
Monroe Nursing Scholarship	1	2,500	
Nursing Undergraduate Scholars	0		
Speech			
Lucia Morgan Scholarship	2	2	1,500.00
Study Abroad	0	0	0.00
Ebersole Endowment	0		
Summer Seville Awards	0		
Graduate and Professional School Scholarships Total			\$4,884,748
Dentistry			
Dental Scholarship	28	341,000	341,000.00
Dental School Scholarship	0		
Student Stores Dental Scholarship	0		
Journalism			
Jornic Graduate Tuition Grant	0	0	0.00
Law			
Alala Law Scholarship	0	440	1,347,370.00
Alan Berman Law Scholarship	1	2,700	
Albert Ellis Law Scholarship	1	3,400	
Augustus Raymer Law Scholarship	0		
Aycock-Poe Law Scholarship	4	28,000	
Barry Brown Law Scholarship	4	31,500	
Bennett Law Scholarship	1	1,600	
Brandis Law Scholarship	2	3,500	
Charles Mangum Law Scholarship	0		
Christy Deal Law Scholarship	1	6,000	
Clarkson Family Scholarship	1	5,000	
Class of 2000 Endowed Scholarship	1	1,000	
Cowell Family Scholarship	2	2,200	
CS Law Tuition Fund	1	1,400	
D. & E. Cooke Law Scholarship	91	339,750	
Dameron Law Scholarship	0		
Dixie Atwater Law Scholarship	4	20,000	
Ellis Meenan Law Scholarship	4	9,200	
Everett Law Scholarship	1	3,500	
Fleishman-Boyette Law Scholarship	1	1,400	
Frank Taylor Law Scholarship	1	2,000	
Franklin Dupree Law Scholarship	3	11,000	
Fred O. Bowman Law Scholarship	1	2,500	
Goudes Law Scholarship	1	4,500	
Graham Carlton Law Scholarship	3	16,000	
Hal Broadfoot Law Scholarship	1	1,000	
Huntton & Williams Law Scholarship	1	3,000	
Ivey Law Scholarship	0		
James Davis Law	5	34,791	
Judge Hedrick Law Scholarship	3	15,000	
Kenan Law Scholarship	0		
Kirby Law Scholarship	3	24,000	
Law Alumni Scholarship	3	5,000	
Law Banking & Finance Scholarship	1	13,600	
Law Minority Fellowship	2	2,000	
Law School Grant	1	2,000	
Leonard Law Scholarship	14	42,000	
Louis Law Scholarship	2	8,000	
M. & W. Johnson Law Scholarship	2	11,318	
Martin Law Scholarship	1	5,000	
Moore & Van Allen Law Scholarship	6	52,000	
Murtna Family Scholarship	1	1,000	
Nancy Rhoden Law Scholarship	1	10,000	
Naomi Morris Law Scholarship	2	2,250	
Nelson Young Law Scholarship	2	4,000	
Perry and Seipp Scholarship	1	8,000	
Peter Daniel Memorial Scholarship	1	5,000	
Porter CSP Law Scholarship	1	2,500	
Robert Byrd Law Scholarship	1	10,000	
	1	2,500	

	Number of Awards	Amount of Awards
Robert Dearborn Law Scholarship	2	7,500
Rosenstein Family Scholarship	1	3,500
Rouse Memorial Law Scholarship	0	
Ruffy Law Scholarship	1	6,800
Seawell Law Scholarship	2	13,500
Stacy Law Scholarship	1	5,000
Student Stores Law Scholarship	0	
Thomas R. Eller Scholarship	1	3,000
Thornton Brooks Law Scholarship	1	1,500
Travis Brown Law Scholarship	3	5,000
Tuition Refund Scholarship	0	
Twentieth District Bar Scholarship	0	
University Law Fund	241	532,961
Van Hecke Law Scholarship	0	
Wallace Grey Law Scholarship	1	3,000
Watson Law Scholarship	1	1,500
Well Law Scholarship	1	2,500
Wetach Law Scholarship	0	
Whedbee Law Scholarship	0	
Willis Whichard Law Scholarship	1	3,500
Medicine	663	2,747,798.00
1935, 1936, 1937 Class Med. Scholarship	0	
Adam Thorp Medical Scholarship	0	
Augustus H. Jones Scholarship	0	
Barrett-1934 Medical Scholarship	6	14,025
Berryhill-Mecklenburg Med. Scholarship	1	2,426
Braswell Medical Scholarship	14	30,772
Braxton Medical Scholarship	0	
Brown Medical Scholarship	64	174,429
Charles H. Burnett Med. Scholarship	0	
Charles Mangurn Medical Scholarship	1	3,100
Class of 1972 Medical Scholarship	0	
Clifford Wheelless Medical Scholarship	6	13,737
Daniel Scholarship in Medicine	0	
Dennis L. Fox Medical Scholarship	1	4,830
Dr. Eli Saleeby Medical Scholarship	0	
Dr. I. Taylor Medical Scholarship	0	
Dr. William Hall Medical Scholarship	0	
Edwards-Hobgood Medical Scholarship	39	96,800
Edwards-Hobgood Merit Scholarship	5	50,000
Eubanks Medical Scholarship	0	
Farrell Medical Scholarship	0	
Fleishman Medical Scholarship	1	2,500
Grover Dale Medical Scholarship	3	7,670
Guilford-NCMH Medical Scholarship	1	3,100
Guterman Scholarship	1	5,000
H McLeod & M Riggins Merit Scholarship	2	6,000
Isaac Manning Medical Scholarship	10	33,900
J. Rush Shull Medical Scholarship	2	25,000
John Hartness Medical Scholarship	0	
John Idol Medical Scholarship	29	75,962
Joyner Medical Scholarship	0	
Lock Medical Scholarship	12	23,550
Long Medical Scholarship	0	
Louis & Betsy West Medical Scholarship	1	6,500
Lowder Medical Scholarship	0	
Margaret & Lorimer Midgett Scholarship	0	
McKee Medical Scholarship	0	
McLendon Medical Scholarship	0	
McLeod Medical Scholarship	36	331,200
Medical Alumni Loyalty Scholarship	4	8,000
Medical Foundation Scholarship	8	20,000
Medical Foundation Recruitment	13	82,920
Medical Merit Scholarship		
Medical Scholarship		
Medical Tuition Scholarship	188	1,104,843
Morehead Medical Scholarship	18	92,250
Parker Medical Scholarship	1	2,188

	Number of Awards	Amount of Awards
Pope Medical Loan	0	
Private Medical Scholarship	0	
R.H. & Mary Speight Medical Scholarship	0	
Riggins Medical Scholarship	1	3,100
Robert E. Smight Med. Scholarship	0	
Robert E. Smith Med. Scholarship	129	342,415
Sarah Kenan Medical Scholarship	0	
Stemberger Medical Scholarship	0	
Student Stores Medical Scholarship	0	
Taylor Medical Scholarship	0	
Thomas Dark Medical Scholarship	18	43,800
Thomas Sumner Medical Scholarship	0	
W. Reece Berryhill Med. Scholarship	2	5,763
W.K. Kellog Medical Loan	0	
Weinstein Medical Scholarship	0	
Whitehead Clinical Lab. Scholarship	3	3,000
Whitehead Medical Scholarship	19	52,250
Wilder Medical Scholarship	20	63,032
William H. Davis Scholarship	1	5,000
William Orr Medical Scholarship	3	8,736
William T. Turlington Med Scholarship	0	
Minority/Presence Graduate Scholarships	28	21,310.00
Minority Presence Dental Scholarship	7	3,710
Minority Presence Graduate Scholarship	21	17,600
Minority Presence Medical Scholarship	0	
Minority Presence Law Scholarship	0	
Nursing	0	0.00
Brummett/Kemble Scholarship	0	
Elizabeth S. Carrington Scholarship	0	
Graduate Student Scholarship	0	
The Glaxo Fellowship	0	
Jimmie Butts Scholarship	0	
Joanne A. Sandergaard Endowment Scholarship	0	
Kellett Nursing Scholarship	0	
Lunsford Richardson Scholarship	0	
R. H. & Mary P. Speight	0	
Thomas L. & Jane S. Norris Scholarship	0	
Nutrition	0	0.00
Dept. Of Nutrition Scholarship	0	
Occupational Therapy	0	0.00
Occ. Therapy Recruitment Award	0	
Pharmacy	148	323,750.00
Eubariks Pharmacy Scholarship	1	1,200
Pharmacy Need-Based Scholarship	129	233,550
Pharmacy School Scholarship	18	89,000
Physical Therapy	10	98,125.00
Beauty Physical Therapy Scholarship	0	
MPT Scholarship	3	13,500
Public Health Need Based Grant	51	47,625
Sande MPT Scholarship	10	37,000
Public Health	1	1,000.00
Blee - Hay Scholarship	1	1,000
Social Work	4	4,395.00
Annie K. Bost Scholarship	3	3,645
Carrie Schwenning Scholarship	1	750
Student Counseling	0	0.00
Focus Scholarship	0	
Graduate/Professional Awards Total	2,343	\$10,080,985
(Please note that these funds do NOT include all graduate awards.)		
Departmental Private Scholarship	310	447,118
Graduate Fellowship	314	1,922,156
Graduate Scholarship/Grant	0	0.00
Graduate Traineeship	245	1,851,927
Graduate Tuition & Fee Payment	1,433	5,651,784
Tuition Grant-Dental School	41	208,000

Tuition/Remission/Waivers Total
 Employee Tuition/Fee Waiver
 Graduate Tuition Remission
 Military Tuition Benefit
 Partial Tuition Reduction

	Number of Awards	Amount of Awards
	6	7,572
	312	3,833,370
	18	208,989
	27	42,900
Total	363	\$4,092,831

Federal Funds Total

0 \$0

Health Professional Scholarships Total

0 \$0

Dental Scholarships

0 0.00

EFN Dental Scholarship

0

Health Professions Dental Scholarship

0

SDS Dental Scholarship

0 0.00

Public Health

0 0.00

SDS Public Health Scholarship

0 0.00

Medicine

0 0.00

SDS Medical Scholarship after 98/99

0 0.00

Total Scholarships/Awards **7,553** **\$32,651,459**

Grants

University Funds Total 9,799 41 81,985.00 \$22,329,989

Native American Grants

0 41 81,985

Native American Incentive Grant- Graduate

41

Native American Incentive Scholarship

0 81,985

Tuition Enhancement Grants

9,278 15,769,991.00

General Fund Grant

37 70,485

Tuition Grant

9,232 15,687,339

Undergraduate Grant

9 12,167

University Fund Grant

0

Athletic Grant-In-Aid 480 480 6,478,013 6,478,013.00

Student Stores (see Joseph T. Pogue and General Undergraduate Scholarships)

State Funds Total 2,797 204 5,527,679 5,527,679.00 \$6,197,692

UNC Need-based Scholarships

2,797 2,277 6,119,224 6,119,224.00

N.C. School of Science and Math Awards

204 204 648,013 648,013.00

State General Fund Grant

5 5 22,000 22,000.00

Federal Funds Total 2,277 486 943,205 \$7,062,429

Pell Grants

2,277 2,277 6,119,224 6,119,224.00

Supplemental Grants

486 486 943,205 943,205.00

Federal Supplemental Grant

486

Total Grants **15,568** **\$35,590,110**

Work-Study

Federal Work-Study Total (Need-Based) 31 1,100 56,665 56,665.00 \$2,046,663

America Reads Work Study Jobs

31 1,100 56,665 56,665.00

Community Service Jobs

21 34,379 34,379 34,379.00

Covenant Summer Work Study

94 58,333 58,333 58,333.00

Federal Amer. Reads Work Study

3 1,780 1,780 1,780.00

Federal Amer. Reads Work Study- Covenant

7 10,157 10,157 10,157.00

Federal Community Service Work Study

1 481 481 481.00

Federal Community Service Work Study- Covenant

11 14,584 14,584 14,584.00

Graduate Assistants

259 377,871 377,871 377,871.00

On-Campus Jobs

51 473,843 473,843 473,843.00

On-Campus Jobs

622 1,018,570 1,018,570 1,018,570.00

Total Work-Study **1,100** **\$2,046,663**

Number of Awards	Amount of Awards
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Loans

University Funds Total								
Addie W. Coats Loan	0	139						\$327,815
Consolidated Loan	123		192,678					
George and Texie Shackouse Loan	0							
James & Iona Ballou Loan	15		122,412					
James & Iona Ballou Loan Descendent	0							
Milton T. & Mary M. Narey Loan	0							
Order Of The Grail Loan	1		12,725					
Robert W. Johnson Medical Loan	1							
Federal Funds Total		2,932						\$8,778,257
Perkins Loans (Need-Based)	2,802	2,802	8,076,510	8,076,510.00				\$8,076,510
Health Professions Student Loans		65		701,747.00				\$701,747
Dentistry		45		591,005.00				
Health Professions Dental Loan	44		576,005					
LDS Dental Loan	1		15,000					
Medicine		0		0.00				
Health Professions Medical Loan	0							
LDS Medical Loan	0							
Primary Care Medical Loan	0							
Nursing		4		20,076.00				
Federal Nursing Loan	4		20,076					
Pharmacy		16		90,666.00				
HEAHealth Professions Pharmacy Loan	16		90,666					
Total Loans		3,071						\$9,106,072

TOTAL AWARDS FROM UNIVERSITY-CONTROLLED SOURCES **\$79,394,304**

AWARDS FROM OUTSIDE SOURCES

Scholarships

Recognition Scholarships		227						\$392,750
National Merit Scholarships								
National Merit Scholarship (Non-Renewable)	3	211	7,500	356,750.00				
National Merit Scholarship	0							
National Merit Scholarship	141		284,750					
National Merit Supplemental Scholarship	67		64,500					
National Achievement Scholarships		16		36,000.00				
National Achievement Scholarship (Non-Renewable)	12		30,000					
National Achievement Scholarship	4		6,000					

State Scholarships		396						\$3,003,669
N. C. Teaching Fellows Awards								
N. C. Nurse Scholarships	216	216	1,295,850	1,295,850.00				
Other State Scholarships		80		358,000.00				
Board of Governors Dental Scholarship	29		608,548					
Board of Governors Medical Scholarship	30		459,386					
Cameron Scholarship	7		22,435					
N. C. Dept. of Veterans Affairs	31		246,245					
N. C. Dept. Services for Blind	3		13,205					
State Scholarship								

Various Sponsored Scholarships		4,756						\$10,587,814
A.B.W.A. Association Scholarship	8		5,450					
Aid for Lutherans Scholarship	23		16,125					
Air Force ROTC	19		168,554					
AKA Sorority Scholarship	19		18,274					
American Business Clubs Scholarship	0							
Anterriorcorps	68		196,050					
Army Relief	12		22,200					

	Number of Awards	Amount of Awards
Army ROTC	16	177,775
Aubrey Lee Brooks Scholarship	38	295,719
Bureau of Indian Affairs Grant	0	
Business & Professional Women's Scholarship	9	4,950
Carolina Power & Light Scholarship	0	
Centura Bank Summer Bridge Scholarship	0	
Charlotte-Mecklenburg PTA Scholarship	2	700
Church Scholarship	18	9,000
Citizens Scholarship Foundation	270	498,000
Civilian Club Scholarship	11	11,850
Clara Abbott Scholarship	9	23,480
Coca Cola Scholarship	28	43,500
CSS Sponsored Scholarship	57	146,000
DC Tuition Assistance Grant	33	320,000
Delta Sigma Theta Scholarship	7	6,834
Departmental Scholarship	35	268,638
Dixson Scholarship	0	
Duke Power Scholarship	8	28,000
Eastern Bank of Cherokees Scholarship	15	72,870
Elks Scholarship	29	25,750
Gates Scholarship	38	222,063
Golden Leaf Scholarship	27	78,500
Grant	33	23,300
Greensboro Parks & Rec. Scholarship	1	400
Huffman-Cornwell Scholarship	2	2,500
Hugh Morson Scholarship	11	11,000
Hyatt Memorial Scholarship	4	12,000
Indian Education Fellowship	0	
Indian Health Service Scholarship	0	
James B. Hunt College Scholarship	0	
James G. Martin Scholarship	0	
James McClure Scholarship	0	
Jaycees/Jaycettes Scholarship	4	1,750
John McNair Scholarship	1	1,000
Junior Miss Scholarship	16	24,429
Kemper Foundation Scholarship	0	
Kiwanis Club Scholarship	48	48,900
Legislative College Opportunity	0	
Life-Long Learning Scholarship	0	
Lincoln Lane Foundation Scholarship	0	
Lions Club Scholarship	21	14,600
Marie Shank Scholarship	0	
Marine Corps Scholarship	15	19,670
Martin Marietta Scholarship	0	
Meilinger Foundation Scholarship	0	
N.C. Assoc. of Insurance Agents	2	3,000
N.C. 4-H Development Fund Scholarship	0	
N.C. Insurance Agents Scholarship	0	
National Association Principals' Scholarship	0	
National Guard Grant	6	10,311
National Health Service Scholarship	13	6,600
National Honor Society Scholarship	26	301,426
Navy ROTC	4	1,700
NCAEOP Scholarship	3	9,000
NCAR-EMS Scholarship	0	
NCNB Scholarship	11	15,620
Officers Wives Scholarship	17	10,270
Optimist Club Scholarship	6	5,100
Order of Eastern Star Scholarship	8	14,000
Percy Ferebee Scholarship	0	
Pharmaceutical Association Scholarship	0	
Private Scholarship	1,440	2,796,453
Private Scholarship (2nd Fund)	279	318,100
Private Scholarship (3rd Fund)	98	94,680
Private Scholarship (4th Fund)	29	25,550
Private Scholarship (5th Fund)	12	13,000
R. J. Reynolds Scholarship	35	75,627
Rapid American Corp. Scholarship	0	

	Number of Awards	Amount of Awards		
Renewable Private Scholarship (2nd Fund)	76	110,372		
Renewable Private Scholarship (3rd Fund)	0			
Renewable Private Scholarship (4th Fund)	0			
Renewable Private Scholarship	835	2,213,610		
Reuben Robertson Scholarship	3	6,000		
Robert Byrd Honors Scholarship	296	437,150		
Rotary Club Scholarship	211	267,054		
Sam Walton Wal-Mart Scholarship	39	40,500		
Scholarship	0			
Sirrine Scholarship	1	2,000		
Sponsors-Academic Talent Scholarship	12	11,000		
State Employees Association Scholarship	18	12,050		
State Prepaid Tuition Benefit	114	439,188		
T. Austin Finch Scholarship	0			
Thomas & Mary Leath Scholarship	20	70,200		
Thomas H. Carrow Scholarship	4	12,000		
Thomas J. Watson Scholarship	84	180,000		
Thomas Skinner Scholarship	0			
Thomasville Furniture-Finch Scholarship	0			
Timothy A. Brooks Scholarship	1	4,000		
Top of the Y Scholarship	0			
Triangle Advertising Scholarship	3	7,500		
Tuition Grant	0			
U.D.C. Scholarship	6	3,650		
VA Contributory Benefits				
Veterans Administration Scholarship	8	45,054		
Veterans Educational Benefits				
Vocational Rehab. Grant	43	155,668		
Wade H. Atkinson Scholarship	3	6,900		
Wal-Mart Scholarship	0			
William B. Rodman Scholarship	2	400		
William Colburn Scholarship	2	4,000		
Winn-Dixie Scholarship	0			
Women's Club Scholarship	31	39,250		
Foundation Scholarships	383	\$4,490,907		
Coffey Foundation Scholarship	19	129,500		
Fieldcrest Foundation Scholarship	0			
Firestone Scholarship	0			
Foundation for Carolinas Scholarship	58	165,750		
Foundation Scholarship Program	48	153,299		
Francis O. Caddle Scholarship	0			
Frank & Sallie Borden Fdn. Scholarship	0			
Gregory Foundation Scholarship	4	3,850		
Lutz Foundation Scholarship	12	6,000		
McNair Foundation Scholarship	0			
Morehead Award	196	3,897,628		
N.C. Morehead Merit Award	0			
Sternberger Foundation Scholarship	0			
Teagle Foundation Scholarship	0			
Tin Whistles Fdn. Scholarship	1	2,000		
Triangle Community Fdn. Scholarship	12	25,844		
Winston-Salem Foundation Scholarship	33	107,036		
Total Scholarships	5,762	\$18,475,140		
Loans				
Federal Family Educational Loans: Total				
Parent Loans (PLUS) - (Non-Need-Based)	1,043	13,664	9,716,006	\$95,932,096
Subsidized Stafford Loans (Need-Based)	5,862		35,179,754	
Unsubsidized Stafford Loans (Non-Need-Based)	6,759		51,036,336	
Other Loans Total		1,346		\$16,281,165
N.C. Health, Science, Math Loans	92	92	660,568	660,568.00
N.C. Nurse Education Scholarship/Loan	8	8	18,330	18,330.00
N.C. Principal Fellows Award	19	19	370,000	370,000.00
N.C. Professional Teachers Scholarship/Loan	20	20	48,750	48,750.00

Number of Awards	Amount of Awards
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Other Educational Loans

Citibank Loan		823	11,529,492.00
College Foundation Inc., Extra Loan	715		8,742,422
Commercial Loan	14		18,240
Conserrn Loan			
Federal Supplemental Loan (SLS)			
HEAL Loan			
International MBA CFI	84		2,697,358
Law Access Loan	0		
Loan	0		
MBA Access Loan			
MBA Tuition Loan	0		
Medical Alternative Loan	10		71,472
N. C. Guaranteed Loan			
N. C. Social Workers Loan			
Neille Mae Loan			
PHEAA Supplemental Loan			
Robert W. Johnson Dental Loan	0		
TERI Loan	0		
United Methodist Loan			
Private Foundation Loans		384	3,654,025.00
Foundation Loan			
Little Foundation Loan	9		17,900
Maj. D.C. & Mr. Edwards Loan	0		
Pickett & Hatcher Loan	0		
Private Loan #1	341		3,441,032
Private Loan #2	34		195,093
Total Loans		15,010	\$112,213,261

Total Awards from Outside Sources **\$130,688,401**

TOTAL FUNDS AWARDED OR DISTRIBUTED BY THE OFFICE OF SCHOLARSHIPS AND STUDENT AID **\$210,082,705**

Scholarship and Financial Aid (Need and Non-Need-Based) Awards to Undergraduates, Graduate/Professional) Year 1996-1997 to Academic Year 2005-2006

<u>1999-2000</u>	<u>2000-2001</u>	<u>2001-2002</u>	<u>2002-2003</u>	<u>2003-2004</u>	<u>2004-2005</u>	<u>2005-2006</u>
\$119.7	\$128.1	\$134.9	\$163.7	\$188.9	\$200.9	\$210.1
10,599	11,501	12,687	13,552	14,396	14,872	15,120
\$11,289	\$11,136	\$10,633	\$12,081	\$13,117	\$13,508	\$13,942
57%	57%	55%	56%	57%	55%	55%
10	10	9	9	9	8	8
33	33	36	35	34	37	37
45%	38%	43%	44%	42%	42%	42%
1	1	3	3	1	1	1
54	61	54	53	57	57	57

-in-aid, Morehead Awards, ROTC Scholarships, and 198. Patterns change as data quality improves.

(27,2007).

Equitable Use of Grades in Measuring Student Accomplishment:
Analyses and Recommendations of the Subcommittee on Grading

Report of the Educational Policy Committee
University of North Carolina at Chapel Hill

Report Prepared by the Subcommittee on Grading

Peter C. Gordon (Chair)
Andrew J. Perrin
Gwendolyn Sancar
Kevin G. Stewart

Analyses of grading patterns at Carolina and at other universities have shown that there is substantial variation in the grades assigned in different courses, variation that reflects differing grading practices across academic disciplines and instructors.¹ This report examines how variation in grading practices affects the validity of grade-point average (GPA) as an aggregate measure of student accomplishment. It shows that the Achievement Index², an alternative method of aggregating students' grades that takes into account differences in grading patterns across courses, provides a better measure of relative student accomplishment than does raw GPA. It recommends that undergraduate transcripts list student Achievement Index in addition to raw GPA and that University Distinction be awarded based on the Achievement Index. These recommendations are presented to Faculty Council in the form of proposed legislation at the end of this report.

GRADES AS A MEASURE FOR COMPARING STUDENT PERFORMANCE

One common use of grades is to compare the academic accomplishments of different students. Grades are used in decisions about admissions to professional schools and graduate programs, in employment decisions, and by the University in awarding distinction upon graduation. While this report recognizes that grades are used for purposes other than comparing students' performance, its analyses and recommendations proceed from the observation that the University systematically uses grades to compare students' performance. Because this is a necessary, consequential, and widespread use of grades, the University should present information about grades in such a way as to maximize the validity of the comparisons made between students.

Grade point average is a familiar measure of student performance that is commonly used in college and high school. It is the average of the numerical equivalents of a student's letter grades, weighted by the number of credits associated with each grade. GPA has long been recognized as a very problematic measure.³ The most serious problem is that it is difficult to compare GPAs because students take different classes and the grading practices across classes vary substantially. The source of much of the variation between students' GPAs is therefore the courses and instructors students encountered, not the students' performance in those courses. Despite this problem, GPA is by far the most common aggregate measure used for the purpose of comparing the performance of different students.

The Achievement Index. The analyses and recommendations in this report focus on the Achievement Index (or AI), which was developed by Valen Johnson while he was in the Institute of Statistics and Decisions at Duke University, as an alternative to GPA that allows more valid comparisons of students' academic accomplishments. The AI is one of a number of statistical

¹ Quantitative analyses of grading patterns that document these patterns at Carolina can be found in two EPC reports: *Grade Inflation at UNC Chapel Hill* (<http://www.unc.edu/faculty/facconn/reports/R2000EPCGrdInfl.PDF>) and the *Annual Report for 2004* (<http://www.unc.edu/faculty/facconn/reports/2003-04/R04EPIP1.htm>). Other recent discussions of grading at Carolina can be found in the 2001 *Report of the Task Force on Grading Standards* (<http://www.unc.edu/faculty/facconn/reports/2000-01/R2001GradingStandards.htm>) and *EPC's Annual Report for 2005* (<http://www.unc.edu/faculty/facconn/reports/2004-05/R05EPC1.htm>).

² Johnson, V.E. (1997). An alternative to traditional GPA for evaluating student performance. *Statistical Science*, 12, 257-278; Johnson, V.E. (2003). *Grade inflation: A crisis in college education*. New York, NY: Springer.

³ In addition to the works by V. Johnson, see Stricker, L.J. et al. (1992). *Adjusting college grade point average for variations in grading standards*, (Research Report, Educational Testing Service) and Lei, P.W. et al. (2001). *Alternatives to the grade-point average as a measure of academic achievement in college*, (ACT Research Report Series).

methods developed to address problems with GPA. Other methods which have been subjected to serious analysis include procedures based on linear regression and on Item Response Theory (to which AI is related).⁴ The AI is used here because of the thoroughness with which it has been examined and because its assumptions about the meaning of grades seem to be the most appropriate for college grading.⁵ Further, the AI builds on the current system of grading and places no restrictions on faculty members' use of specific grades, a characteristic that is advantageous in practice and also in principle because it recognizes faculty members' academic freedom.

The Achievement Index (AI) is a measure of a student's performance relative to all other students taking classes at the institution at which the student is taking classes. While calculation of the AI is complex, its underlying principles are simple and relate in a straightforward way to issues in college grading. A brief summary of the AI is given below.

- Assumptions about the meaning of grades. The AI makes the minimal assumption that in all courses grades provide ordinal information about the performance of students in a class; grades are not assumed to provide further information (particularly about absolute levels of performance) in a way that can be combined meaningfully across courses. Building on this minimal assumption, the grades assigned in a class are used to categorize students into groups receiving the same grade and to rank those groups relative to other groups (e.g., students getting A are in the top-ranked group, students getting A- are in the second-ranked group, etc.). The number of ranked groups in a class depends on the number of different grade categories that are used by the instructor. For example, there would be three ranked groups in a class where the only grades used were A, A- and B+ while there would be four ranked groups in a class which used the grades A-, B+, B and B-. In this example an A- in the second class would be equivalent to an A in the first class because both indicate placement in the top-ranked group.

- Using the ordinal information provided by grades. A student's AI is a summary score indicating the student's academic performance relative to the performance of other students taking classes at the University; it is calculated by determining what score is most likely for the student given the ordinal information about grades in the courses that the student took. This calculation takes into account the fact that students take different courses from different instructors, and that they do so with different classmates. Combining information across these different classes requires information about the criteria that individual instructors use to assign grades; criteria that are expressed as cutoffs for the percentage of students that are assigned to different grade categories (top category, next best category, etc.). Those cutoffs must be estimated with respect to all students, not just the students in a given instructor's class. Therefore, the AI calculation evaluates different cutoffs for grade categories in a class until it finds the cutoffs under which the grades in the class are most likely to occur given the AI scores of the students in the class. Information about the cutoffs for classes is then used to refine the students' AI scores, which in turn are used to obtain a better estimate of

⁴ Lankey, P. & Caulkin, J. (1992). *Incentives to fail*. Working Paper 92-51, Heinz School of Public Policy and Management, Carnegie Mellon University. Young, J.W. (1990). Adjusting the cumulative GPA based on item response theory. *Journal of Educational Measurement*, 12, 175-186.

⁵ The EPC Annual Report in 2005 discusses the merits of the AI in relation to approaches for adjusting GPA based on linear regression and also in relation to the procedure commonly used in high schools of assigning higher numerical values to grades in AP and honors classes as compared to regular classes.

instructor's grade cutoffs. This back and forth process is repeated until the set of student AI scores and the set of instructor grade cutoffs are found for which the observed pattern of all students' grades in all classes is most likely to occur.

- Consequence 1. The grade that a student receives in a class contributes to that student's AI only to the extent that it provides information about that student's achievement relative to other students' achievement. Thus, in a class where all students get the same grade (e.g., an A) that grade neither helps nor hurts the student's AI.
- Consequence 2. The meaning of the ordinal information provided by the ranked grade categories in a class depends on the overall academic performance of the students taking the class (e.g., it is a greater achievement to outperform students who generally do well in their other classes than it is to outperform students who generally do poorly in their other classes).

Assessment of AI using grades at Carolina. For this assessment, GPA and AI were computed for students earning a Bachelors degree at Carolina from May of 1999 through May of 2004.⁶ While GPA and AI are different ways of looking at student accomplishment, it is noteworthy that the views that they provide are far more similar than they are different, with the rankings of student accomplishment as measured by GPA and by AI having a correlation of .926 (a correlation of 1.0 would mean that the two rankings were identical). This comes as no surprise since GPA and AI are computed from the same grades. While there is a great deal of similarity between the results obtained by the two measures there are differences as well. In cases where they differ, the validity of the rankings based on GPA and AI can be assessed by examining whether GPA ranking or AI ranking is a better predictor of performance by students enrolled in the same class at the same time. This is done on the assumption that instructors apply the same standard to all students in a class and that when evaluated by the same standard more accomplished students tend to do better than less accomplished students. This analysis was done for all pairs of students where one student in the pair was ranked higher by GPA but the other student was ranked higher by AI. In 61% of cases where students in such pairs earned different grades in the same class, the higher grade was earned by the student who ranked higher on AI but lower on GPA. This shows that where GPA and AI diverge, AI provides a more valid measure of student performance.⁷

⁶ The analyses presented in this report were based on a data set, compiled by the Registrar's office, containing all grades given in courses taken by undergraduates from Fall 1995 through Spring 2004. Results are presented beginning with the graduating class of Spring 1999 because most students graduating earlier had taken many courses before the period covered by the data set. Further, the analyses did not include students who took 10 or fewer classes during the time of the analyses. Exploratory analyses showed that the pattern of results was not influenced much by the number-of-classes criterion for inclusion. Finally, the analyses did not include classes with fewer than five students because calculating AI in those cases requires assumptions that are not necessary for larger classes. Calculation of the AI was performed by Valen Johnson (now at the M.D. Anderson Cancer Center of the University of Texas), whose assistance is gratefully acknowledged.

⁷ This method assesses what is called internal order consistency. The ordering of students by aggregate measures (in this case GPA and AI) is evaluated using the ordering of students on that subset of measures (in this case classes) that allow students to be compared directly. Another method for assessing the relative validity of different aggregate measures is to compare the strengths of their relationships to a measure of student performance that is external to college grading. Unfortunately, no external measures of this sort are generally available for college students while they are in college or after they graduate. The only available external measures reflect student performance prior to college and consist of performance in high school and on standardized tests. The multiple correlation of GPA with high-school class rank and SAT scores in the group studied here was .516 (26.6% of the variance) and for AI it was .595 (35.4% of the variance). While this pattern supports the idea that AI is a better

The question of whether there are consequences associated with the divergences between AI and GPA was examined by looking at the awarding of different levels of distinction (Distinction and Highest Distinction), which at Carolina are awarded on the basis of student GPA. To the extent that GPA measures characteristics of courses and instructors rather than student performance, using GPA is an inaccurate and unfair way to award distinction. During the period studied for this report, the top 5.6% of students graduated with highest distinction (GPA of 3.8 or higher) and the next 17% graduated with distinction (GPA of 3.5 to 3.8).⁸ Those percentages were applied to students ranked by AI in order to determine an alternative AI-Distinction which could be compared to the currently used GPA-Distinction. Table 1 shows the numbers of students receiving distinction under the two methods. Approximately 26% of students merit distinction by at least one of the methods while the remaining 74% of students do not merit distinction by either method. Of the students who merit distinction by one of the methods, approximately 64% are categorized in the same way (Distinction or Highest Distinction) by both methods. The remaining 36% of those students receive different levels of distinction depending on which method is used (GPA-Distinction or AI-Distinction), which shows that the proportion of students who switch distinction categories is large. This indicates that variation in grading across courses, instructors, and departments, which are taken into account by the AI but not by GPA, exerts considerable impact on which students receive distinction at Carolina.

GPA Distinction	Achievement Index	
	None Distinction	Highest
None	15667	769
Distinction	766	2609
Highest	4	241

Table 1. Number of students receiving different levels of distinction using the current GPA method and the AI method. Students on the diagonal (numbers with background shading) receive the same level of distinction by GPA and AI. Students above the diagonal (numbers surrounded by a dark line) get higher distinction by AI than by GPA. Students below the diagonal (numbers surrounded by a double line) get higher distinction by GPA than by AI.

The validity of the distinction categories created from GPA and AI were assessed by examining whether GPA-based distinction or AI-based distinction was a better predictor of performance by students enrolled in the same class at the same time. There were 22,296 cases where the students in such a pair earned different grades in the same class. In 14,455 of those cases (65%) the student with AI-only Distinction earned a higher grade than the student with GPA-only Distinction. For Highest Distinction, there were 1484 relevant pairings and for 914 of them (62%) the student with AI-only Highest Distinction earned a higher grade than the student with GPA-only Highest Distinction. Thus, when taking exactly the same class students in the

aggregate measure than GPA, this report focuses on internal consistency measures because they rely solely on evaluations made at Carolina and make no assumptions about the relevance or validity of high school class rank or SAT scores.
⁸ Determination of distinction was based on GPA calculated from grades in the data set, not from actual award of distinction, because in some cases grades that were not in the data set contributed to the GPAs used for determining distinction. Exploratory analyses showed that the pattern of results was not influenced much by using actual distinction rather than calculated distinction.

AI-only groups, who currently receive no or lesser distinction, got a higher grade almost twice as often than did students from the GPA-only groups, who currently receive higher distinction.

RECOMMENDATIONS

The analyses presented above show that AI provides a more accurate (and hence more equitable) basis for comparing student performance than does GPA. Accordingly it is recommended that Carolina should:

- **List AI on students' transcripts.** AI should be calculated from students' course grades and listed on their transcripts in addition to GPA. AI scores are real numbers distributed around zero. However, a simple rescaling procedure transforms those scores onto the familiar four-point scale used for grades. This rescaled AI would be used on students' transcripts and would be described as either Achievement GPA or Adjusted GPA.
- **Award distinction based on AI.** The current system for awarding distinction was adopted by Faculty Council in the mid 1980s, and while it is based on absolute levels of GPA one consideration in choosing was that about 5% of students would be expected to earn Highest Distinction and an additional 10% would earn Distinction given the grade levels at the time. In Spring of 2004, 5.7% of graduating students received Highest Distinction and 16.9% received Distinction. Using AI for awarding distinction requires re-considering the percentage of students whose performance should be recognized with different levels of distinction. The selection of percentage cutoffs to be applied to the AI in awarding distinction need not be governed by the considerations used in the mid 1980s. In addition, it might be desirable to change from two to three levels of distinction (Distinction, High Distinction and Highest Distinction).
- **Determine class rank using AI.** Upon request, the Registrar's Office provides students with a letter indicating their class rank based on GPA. Instead, class rank would be determined using AI.

Additional review will be needed to determine whether there are other cases where the University currently uses GPA but instead should use AI. For example, at present GPA is used at Carolina for admission to undergraduate professional schools. A decision about whether to use AI rather than GPA should probably be left to the schools that make the admissions decisions, though it might be beneficial for the University to formulate guidelines about how AI could be used. As a second example, the criteria for awarding Departmental Honors at Carolina are formulated by departments, which do so within the framework of University guidelines that include GPA; again, consideration would need to be given to the question of whether those guidelines should be reformulated. Finally, GPA plays a role in standards for graduation and continuing academic eligibility. However, graduation and continuing eligibility should not be based on comparative standards and therefore AI should not be incorporated into those standards.

Implementation. A number of important issues would have to be addressed in order for the AI to be used at Carolina in the manner described above. We recommend that an implementation committee composed of faculty and administrators be constituted and charged with resolving technical and procedural issues associated with using the AI. The critical technical issues center on methods for secure and reliable calculation of the AI. Critical procedural issues include questions such as how to define cohorts of students for purposes of determining distinction and class rank, and how to communicate information about the AI.

GPA may be a misleading measure but it is very familiar. AI is not familiar, so procedures would have to be developed for communicating information about AI both internally to students and teachers at Carolina and externally to employers and other educational institutions that consider the academic performance of our students. Procedures for internal communication would include informing students about their AIs after every semester in which they take classes and also providing information to students and teachers about the extent to which classes could impact the AI of an enrolling student based on the degree to which the classes have differentiated levels of student performance in the past. This latter type of information would complement the information that is currently available to students from *Pick-a-Prof*, a commercial service that provides students with information about the grades in individual sections of courses (listed by instructor) at Carolina and at other public universities. Procedures for communicating externally about the AI would have to be developed at a number of levels, ranging from a simple one-sentence statement about the AI, which would appear on documents such as transcripts, to more comprehensive discussions of the mechanics of the AI and the reasons that the University has adopted it.

It is also recommended that during the period in which use of the AI is being implemented, students and faculty should be given information about what the AI would say about student performance and about how classes contribute to students' AIs. While that information would not be part of a student's official record, it would help make the concept of the AI familiar and would also allow the AI implementation group to get feedback on different options for presenting information. Finally, it is recommended that procedures be put in place for tracking the impacts of the AI.

Resolution 2007-___. On Adopting the Achievement Index as the Metric for University-wide Comparative Rankings of Students.

Whereas, interdepartmental and inter-instructor variation in grading in undergraduate courses has been identified by the Educational Policy Committee as a serious and ongoing concern; and

Whereas, although departmental and disciplinary grading standards may appropriately vary in consequence of the philosophies and orientations of the disciplines, nevertheless such grading disparities constitute a specific threat to the validity of University-wide comparative rankings of undergraduate students based solely on grades; now therefore

The Faculty Council resolves:

Pursuant to the recommendation of the Educational Policy Committee in its report to the Council of March, 2007, the Achievement Index [as defined in Valen E. Johnson, "An Alternative to Traditional GPA for Evaluating Student Performance," *Statistical Science*, Vol. 12, No. 4 (Nov. 1997), pp. 251-269] is adopted as the metric for University-wide comparative rankings of undergraduate students, including but not limited to the awarding of University distinction.

The University Registrar is requested to record the student's Achievement Index (AI), or a derivative measure, on the official undergraduate transcript in addition to the traditional Grade Point Average (GPA). The Registrar shall also provide appropriate documentation to allow those relying on transcript information to interpret the AI.

The Provost is requested to appoint an AI Implementation Task Force charged to make recommendations concerning the institutional and technical steps needed to insure the long-term viability of, and stakeholders' confidence in, the calculation, recording, and dissemination of the AI. The task force is also charged with developing procedures for tracking the impact over time of these changes.

JOURNAL OF PROCEEDINGS OF THE GENERAL FACULTY AND FACULTY COUNCIL

March 23, 2007

The Faculty Council of the University of North Carolina at Chapel Hill convened at 3:00 p.m. in the Hitchcock Multipurpose Room of the Sonja Haynes Stone Center for Black Culture and History. The following 54 members of the Council attended: Alperin, Bachtenheimer, Balthrop, Barreau, Blocher, Campbell, Cartwell, Chapman, Chin, Collichio, Conway, Copenhaver, Couper, Dalton, Degener, Desaix, Dupuis, Eble, Gerber, Gilligan, Glazner, Halloran, Hendrick, Hobbs, Kamarei, Kirsch, Kramer, Lastra, LeFebvre, Lesneski, Maffly-Kipp, Matson, Matthysse, McGrath, McIntosh, Moss, Oatley, Papanikolas, Peirce, Peterson, Pruvost, Salmon, Saunders, Selassie, Silversmith, Sulik, Sweeney, Temple, Threadgill, Trotman, Wallace, Weinberg, Whisnant and Wilson. The following 25 members were granted excused absences: Bagnell, Belger, Bennett, Boukheifia, Cairns, Connolly, Fisher, Gullledge, Hightow, Huber, Jonas, Marshall, McCombs, Murphy, Murray, Orth, Rustoni, Sandelowski, Strom-Gottfried, Tiwana, Wasik, Wegner, Wilder, Wissick and Yankaskas. The following 8 members were absent without excuse: Ammerman, Arnold, Booth, Ewend, Keagy, Maclean, Rosamond and Taylor.

Welcome, Opening Remarks, and General Questions

Chancellor Moeser spoke of the dedication earlier this week of the residence hall formerly known as Morrison South in honor of Paul Hardin, who served from 1988 to 1995 as seventh chancellor of the University of North Carolina at Chapel Hill. He praised Chancellor Hardin for leading the Bicentennial Campaign for Carolina, which raised \$440 million, for securing greater fiscal and management flexibility for the University, and for helping to double minority representation on the faculty.

The chancellor announced that the Jack Kent Cooke Foundation has announced that Carolina will become the home of the National College Advising Corps Coordinating Office, which is a new effort to increase college enrollment and graduation among low-income high school and community college students. Carolina will also receive a grant of \$1 million from the Cooke Foundation to place college advisers in 18 low-income high schools across the state.

Chancellor Moeser summarized two recent initiatives from UNC System President Erskine Bowles and the UNC Board of Governors: (1) an 18-month initiative called "the University of North Carolina Tomorrow," and (2) an accountability plan for the UNC System. The first of these is designed to determine how the UNC System can best meet North Carolina's needs over the next two decades. It will be conducted by a blue-ribbon commission that will be assisted by a Scholars Council. The commission will visit each campus in the System and generate recommendations to the Board of Governors. The objectives of the accountability plan include providing a transparent account of goals, directions, and performances on a number of specific performance measures. The plan will address topics such as student success, outstanding faculty, program quality, use of space, and private fund-raising.

Finally, the chancellor announced that he has appointed a 10-member task force chaired by Exec. Assoc. Provost Stephen Allred to study and respond to a "Report on Academic Responsibility" recently prepared by the Student Advisory Committee to the Chancellor. Members of the task force include Professors Frayda Bluestein (Government), Karen Gil (Psychology), Darryl Gless (English), Ronald Strauss (Dentistry), undergraduate students Ronald Bilbao, Ashley Collette Groves, and Matthew Hendren; graduate student Lauren Anderson, and Dean Melissa Exum.

Provost Bernadette Gray-Little reported briefly on the following items:

- The final version of a new policy on criminal conviction checks for newly-appointed members of the faculty has been completed and will be implemented beginning July 1, 2007.
- A review team has been appointed to look at the organization and scope of the Graduate School. The team will be chaired by John Keller, Assoc. Provost for Graduate

Education and Dean of the Graduate College at the University of Iowa. Other members include Rosanne Ford, Assoc. Vice President for Research and Graduate Studies at the University of Virginia, and Ruth Walden, Associate Dean of the School of Journalism and Mass Communication here at Carolina.

- A review of advising with the College of Arts and Sciences will be conducted by a review team chaired by Eric R. White, Executive Director of the Division of Undergraduate Studies at The Pennsylvania State University. Other members include Alice Reinartz, Asst. Provost for Enrollment at Texas A&M University, J. Milton Adams, Vice Provost for Academic Programs at the University of Virginia; Professors Lawrence Band (Geography) and Michelle Berger (Women's Studies); Kreemah Lewis (undergraduate), and one additional undergraduate yet to be named. The review will center on the academic advising program in the College, but will also include advising done in Honors, departments and curricula, Study Abroad, student-to-student peer advising, and that provided to student athletes.

Prof. Steven Bachenheimer (Microbiology & Immunology) asked about background checks for persons who are citizens of another country at the time of employment. The Provost said that the University would not be doing checks through Interpol. Assoc. Provost Steven Allred said that this is an acknowledged weakness of the new policy for which there is no easy answer. Prof. Bachenheimer asked whether a new background check would be required with each reappointment. The Provost replied that checks would be done only at the point of initial employment.

Prof. Templeton gave a brief update on efforts being made in response to the Council's recent resolution discouraging street bonfires following basketball games.

Committee Reports

Buildings and Grounds. Prof. David Owens (Government), Chair of the Committee on Buildings and Grounds, presented the committee's annual report.

Copyright. Leah McGinnis Dunn (Undergraduate Library), Chair of the Committee on Copyright, presented the committee's annual report. On behalf of the committee, she introduced and explained a resolution entitled "Encouraging Use of Office of Technology Development's Resources for the Commercialization of Works." She said that the purpose of the resolution, which revises the University's policy on commercialization of copyrighted works, is to give greater incentives to the faculty to use the services of the Office of Technology Development (OTD) for commercialization of their works by giving the creator a greater share of royalties. She said the policy primarily affects creation of software and multi-media works because OTD is not involved in publishing books or journals. Prof. Gregory Copenhaver (Biology) asked whose share of the royalties would be reduced as a result. Ms. Dunn said that the faculty member's department and OTD would receive less, and that departments that would be potentially affected have been consulted and support the change. Prof. Richard Whisnant (Government) asked for clarification on whether the revised policy would affect directed works. Fletcher Fairey, Assoc. University Council, replied that the policy has no effect on production of directed works by the School of Government. Prof. Marci Campbell (Nutrition) pointed out that often works subject to the policy are produced by teams that include SPA personnel and asked whether those team members might share in royalties. Mr. Fairey replied that the State Personnel Act places many obstacles in the way of rewarding SPA personnel for work done in the course of their employment. He said that the University recognizes that this can be unfair and is trying to find ways to address the issue.

The resolution was adopted without dissent and is enrolled as Resolution 2007-6.

Scholarships and Student Aid. Prof. Charles Daye (Law), Chair of the Committee on Scholarships, Awards, and Student Aid, presented the committee's annual report.

Second Reading of Resolution 2007-4 Amending the Faculty Code.

Prof. Michael Lienesch (Political Science), Chair of the Committee on University Government, presented and moved adoption on second reading of Resolution 2007-4.

Prof. Frank Dominguez (Romance Languages) moved adoption of an amendment to reinstate the provisions of current Section 8-4 of the Faculty Code that speak to the right of department chairs in the College of Arts and Sciences to appeal to the provost and chancellor in budgetary matters. Prof. Joseph Ferrell, Secretary of the Faculty, said that this amendment would be appropriate for new Section 6-3 as contained in Resolution 2007-4. Prof. Lienesch said that he had no objection to the proposed amendment. The amendment was adopted. Prof. Ferrell said that he was of the opinion that the amendment was not a material amendment that places the resolution back on first reading and that the General Faculty could proceed to vote on second reading if it so desired. Without objection, Resolution 2007-4 was put on second reading. The resolution, as amended, was adopted without dissent and is enrolled as Resolution 2007-4.

Educational Policy Committee Report and Proposal on Adopting the Achievement Index as the Metric for University-Wide Comparative Rankings of Students.

Prof. Peter Gordon (Psychology), Chair of the Educational Policy Committee, presented a proposal developed by the Educational Policy Committee to adopt the Achievement Index.

Prof. Copenhaver made three criticisms of the AI proposal. First, he noted that the data presented by the Educational Policy Committee shows a 92% correlation between AI and Grade Point Average (GPA). In view of such a high correlation, he wondered whether computing AI would be worth the expense and administrative effort. Second, he said that the AI system assumes that grades are ordinal but it also assumes equivalence from year to year of the same course taught by the same instructor. He suggested that such equivalence does not necessarily exist and that the AI concept fails to account for different levels of ability in the student cohorts in different years. Third, he said that the AI system assumes no pre-differentiation in the students allowed to enroll in particular courses. Prof. Gordon replied that he recognized that there would be some cost involved, but he felt that it would be justified. As to the second criticism, he agreed that the AI system does treat the top grades in a given course the same, no matter what the letter grade, but that overall the objection raised by Prof. Copenhaver on this point is minor.

Prof. Peter Gilligan (Medicine) said that he had been for some years a member of the Medical School's admissions committee and that he did not think that the committee would give much credence to an applicant's AI, or overall GPA, for that matter. Rather, the committee is more influenced by how the applicant has performed in courses directly relevant to the study of medicine, such as science courses. Prof. Gordon replied that he thought that admissions committees are much more sophisticated consumers of academic performance data than Prof. Gilligan's comment might suggest.

Prof. John Sweeney (Journalism & Mass Communication) said that it is his impression that student evaluations tend to drive up GPA over time. He asked whether the Educational Policy Committee had taken this into account. Prof. Gordon replied that there is an extensive literature on this topic and that the findings are inconclusive.

Prof. John Papanikolas (Chemistry) observed that the AI does tend to improve differentiation among student performance in the middle of the curve but does not really help much with differentiating students at the upper and lower extremes. He said that he would expect that employers and admissions committees making use of performance data would not find AI of much help for that reason. Prof. Gordon disagreed.

Prof. Patrick Conway (Economics) expressed concern at the effect AI might have on enrollment in Honors sections. Prof. Gordon said the committee had considered this and concluded that there would be little impact.

Prof. Terence McIntosh (History) asked about the effect on Study Abroad programs. Prof. Gordon said that the Educational Policy Committee had not taken Study Abroad into account and acknowledged that something would need to be done on that account.

Prof. Andrew Chin (Law) noted that an alternative that accomplishes the same objectives as AI would be a mandatory University-wide grading curve. He said that he felt using the AI would be a better and more acceptable solution. Prof. Gordon pointed out that the faculty soundly defeated a proposal for a mandatory grading curve in 2000.

As the adjournment hour was nearing, it was agreed that a special meeting of the faculty will be held on April 13, 2007, to continue the discussion.

Adjournment

Its business having been completed, the Council adjourned at 5:00 p.m.

Joseph S. Ferrell
Secretary of the Faculty