

2016/2017
ANNUAL
REPORT

THE JEFFERSON TRUST

AN INITIATIVE OF THE UNIVERSITY OF VIRGINIA ALUMNI ASSOCIATION

As the Jefferson Trust moves into its second decade,

Donor-Trustees and the University of Virginia at large are beginning to see the long term effects of the 160 grants that the Trust has awarded since its inception in 2006.

Many of these initial, seed fund grants gained support from the University to become ongoing programs. Others have received additional second and third round funding from major foundations and personal alumni gifts, allowing the programs and projects to continue to flourish. As a result, the Jefferson Trust has established itself as a true venture fund around Grounds with an excellent track record of accomplishment and innovation.

This year, the Jefferson Trust awarded \$727,947 to 19 different proposals demonstrating the creativity, entrepreneurship, and collaboration of UVA students, faculty, and leadership. This brings the twelve-year total funding dollars to over \$6.3 million. The Trust has also



begun to gain national recognition as an innovative concept for donor funding of state university initiatives. Two journals of higher education, *The Chronicle of Philanthropy* and *Academic Impressions*, featured the Jefferson Trust as a powerful example of how universities can engage alumni and parent donors to initiate and support new, untested programs and ideas. Additionally, the Trust has been able to provide a successful template for grant consideration and oversight to the development of UVA's new Strategic Investment Fund: a multimillion dollar resource newly-created by the Board of Visitors for larger proposals focused on initiatives that measurably strengthen the University.

Most recently, leaders from the University of North Carolina have reached out to learn more about beginning a similar program to the Jefferson Trust for their university system.

Each of these examples point to the maturity and success of the Jefferson Trust as the program continues to expand and impact the future of UVA. None of this could have occurred without the financial support and selfless service of our many donors and supporters as well as the strong leadership of the UVA Alumni Association. I thank you all who have helped us achieve our success thus far, and invite others to join this exciting intellectual community to bring further distinction to the University of Virginia.

Wayne D. Cozart

Executive Director of the Jefferson Trust

An initiative of the UVA Alumni Association

2016/17 GRANTS

Logistical Pathways to Critical Diversity
School of Engineering
\$100,000

Teaching Methods Course for Engineering TAs
Engineering and Society Dept.
\$89,088

UVA Landscape Studies Initiative
School of Architecture
\$83,000

Virtual Tour-University Guide Service
Student Organization
\$60,000

Inter-professional Innovation: Advanced Disease Life Support
School of Nursing
\$57,700

Simulations in Teacher Education
Curry- Curriculum, Instruction, and Special Education (CISE)
\$50,000

Global Leadership Forum 2017
Global Affairs
\$50,000

Disability Studies Initiative
English Dept.
\$45,000

Diet and Nutrition Intervention Lab
Kinesiology Dept.
\$40,000

The Digital 1828 Catalogue Collection Project
Law Library
\$29,419

Undergraduate Exploration with Cosmic Rays
Physics Dept.
\$26,650

Solar Car Team at UVA
Student Organization
\$20,771

"Mapping"
School of Architecture
\$17,800

Visiting Scholar Program for Underrepresented Minorities in GI
School of Medicine
\$17,400

Inaugural Diversity Funding: "McIntire Allies" & "Diversity Dialogues"
McIntire School of Commerce
\$15,000

Q* Anthology of Queer Culture
Student Organization
\$7,674

College Unions Poetry Slam Invitational
Student Organization
\$7,375

UVA Neurosurgery Teaching and Mentoring Initiative
School of Medicine
\$6,670

Hoots Tutoring
Student Organization
\$4,400



"The Jefferson Trust has entered its second decade on Grounds, and we continue to be excited about the quality and quantity of grant submissions each year. Our board members enjoy the rewards which come from encouraging great ideas, supporting as many as we can, and helping them grow. Seems like a UVA thing to do!"

James E. Rutrough, Jr.

Chair of the Jefferson Trust

The Trustee board is responsible for selecting new grant recipients each year, mentoring and monitoring grant progress, and managing the business affairs of the Jefferson Trust. Donors who have committed \$100,000 or more and sit on the Trustee board are listed below:

James E. Rutrough, Jr., Chair
Col '71
Keswick, Virginia

Ashley Thompson Manning,
Vice Chair, Com '97
Englewood, Colorado

Daniel S. Adler, Eng '88**
Fairfax, Virginia

M. Alexandra Arriaga, Col '87
Arlington, Virginia

Elizabeth A. Boutry, Col '92
Greenwich, Connecticut

Renée DeP. Brown, Col '12
New York, New York

Sara S. Brown, Col '15
San Francisco, California

Bessie J. Bucholz, Col '11
Bozeman, Montana

John A. Burns, Col '14, '15
Washington, D.C.

Pablo Cavelier, Col '15
New York, New York

Michael S. Christopher, Com '00
Houston, Texas

Charles P. Cocke, Com '00
Charlottesville, Virginia

Matthew W. Cooper,
Col '93, Law '96
Richmond, Virginia

Elizabeth A. Daniels, Col '11
New York, New York

Wilson M. Deming, Col '11
New Orleans, Louisiana

Allison Cryor DiNardo,
Col'82, Darden '88
Alexandria, Virginia

Mary C. and Stuart T. Farrell,
Col '07 and Com '07
Richmond, Virginia

C. Thomas Faulders III, Col '71
Charlottesville, Virginia

Robert B. Fauntleroy, Col '80
Manakin Sabot, Virginia

Lee R. Forker, Jr., Darden '63**
Hingham, Massachusetts

Julie Weil Futch, Curry '94
Greenwich, Connecticut

Caroline H. Gibson, Col '15
New York, New York

R. Baxter Gilliam, Jr., Col '11
Charlottesville, Virginia

Jennings S. Grant, Col '11
New York, New York

Grace Hobby Grundy, Eng '12
Charlottesville, Virginia

Victoria Dux Harker, Col '86
McLean, Virginia

John F. Harris, Com '82
Charlottesville, Virginia

Ashley M. Hinchman, Com '00
Darien, Connecticut

James Eric Holder, Eng '84**
New York, New York

Robert S. Hull, Col '86
Wellesley Hills, Massachusetts

Martin H. Kanipe, Jr., Col '81
Richmond, Virginia

Kurt F. Kohlmeyer, Parent
Lake Forest, Illinois

William A. Lascara, Col '80
Virginia Beach, Virginia

Brian D. Macfarlane, Col '15
Washington, D.C.

Thomas B. Mangas, Col '90
New Canaan, Connecticut

Jon E. Mattson, Com '90**
Rye, New York

Edward D. McCrady, Com '85
Atlanta, Georgia

Jordan E. McDaniel, Com '12
Washington, D.C.

Hugh D. McGuirk, Eng '82
Butler, Maryland

Edward C. Mitchell, Jr., Col '63
Atlanta, Georgia

John T. O'Connell, Com '79
Saint Louis, Missouri

Mary M. Owen, Com '00
Birmingham, Michigan

Mark A. Victor Pinho, Com '99
Bronxville, New York

Noreen L. Poulson, Col '78
New Canaan, Connecticut

Michael P. Riordan,
Col '96, Darden '03
Sewickley, Pennsylvania

Christopher H. Rodriguez,
Col '07, Darden, '13
Washington, D.C.

B. Francis Saul III, Col '85
Bethesda, Maryland

Scott A. Saunders, Com '96
New York, New York

Albert N. Small, Col '13
Washington, DC

James R. Socas, Col '88*
McLean, Virginia

Lawrence D. Sperling, Col '81**
Republic of Singapore

Richard T. Spurzem, Col '83
Charlottesville, Virginia

James A. Taylor, Com '88
New York, New York

Alexander L. Thorndike, Parent
Brookline, Massachusetts

Sarah J. and Todd G. Zimmerman,
Curry '90 and Law '90
Parker, Colorado

* Non-donor, appointed
Trustees

** Donor Trustees making
Leadership Gifts

ADDITIONAL
DONORS

AAX Insurance Education Foundation
Carolyn H. Adams &
J. Milton Adams
Catherine Gregor Adams &
Kenneth A. Adams M.D.
Adler Family Foundation
Andrew G. Anderson
Amy B. Axler
Jill Van De Riet Bartlow
Benevity/American Endowment
Foundation
Michael R. Benzian
Margaret Hogshire Bogue &
Clifford W. Bogue M.D.
Jennifer L. Bonenfant &
David L. Bonenfant
W. L. Lyons Brown, Jr.
W. L. Lyons Brown III
Cheryl T. Byron & Robert G. Byron
Capital One Services, LLC
Richard C. Chandler M.D.
Charlottesville Area Community
Foundation
Christen Johnson Chatteleton &
David C. Chatteleton
Theresa T. Clark & Jonathan C. Clark
Whitney W. Cobey &
Alexander D. Cobey
Arika Roy Cocke
Community Foundation Greater
Richmond
Kevin T. Conley
Katherine N. Cooper
Patricia M. Lampkin &
Wayne D. Cozart
Stefan H. Cushman
M. Alex Dashiell
Denver Foundation
James R. Diamonon
Sharmeen B. Dossani &
Uzair A. Dossani
Ashley Massie Doyle & Patrick J. Doyle
Patricia Frist Elcan & Charles A. Elcan
Encore Capital Group Inc.
Allison Kent Jones Evanow &
William A. Evanow
Timothy F. Farrell
Betsy Fauntleroy
Fidelity Charitable Gift Fund
Kaye Campbell Forsman &
Charles E. Forsman
Andrew J. Fuentes
Clarke B. Futch, Esq.
Judy C. Gentry & Gordon L. Gentry, Jr.
Katherine Hobby Gibson
James R. Gray

Greater Saint Louis Community
Foundation
June C. Griffin
Timothy J. Guzi Ph.D.
Jennifer L. Gwilliam &
Scott L. Gwilliam
Alice W. Handy & Peter A. Stoudt
Mark D. Hannan
Drew A. Harker
Anna Wendy Weeks & Steven A. Harris
Anne Ratcliffe Hawkins &
John T. W. Hawkins
Thomas J. Henske
Daniel E. Hinchman Jr.
Hobby Family Foundation
Daniel W. Housier
Stuart E. Houston
David Alan Hyman
Barbara Cole Joynes &
Stanley K. Joynes III
Helen Lewis Kemp & Mark Kemp
Colleen C. Kiernan &
J. Randall Kiernan
Alison H. Kohlmeyer
C. Randall Lewis
Ling Yu & Tuonan Li
Douglass W. List
Eleanor Ann Long
Dudley W. Macfarlane &
John G. Macfarlane III
Allison Cutright Mangas
Mangas Family Foundation
Cheryl Marks & Richard D. Marks
Jill Elaine Maurer
Deanne E. Maynard
Lysa Agundez Meurer &
Paul M. Meurer
Martha C. Nesmith &
Philip M. Nesmith
Kathleen Hull Kelly Oberg
Anita D. O'Connell
Robert O'Connell
Sharon M. Owlett & Charles E. Owlett
Wanda L. Weaver & John S. Painter
Louise B. Parsley & Robert S. Parsley
Paul A. Pastor
Pamela Goble Patterson &
Stephen B. Patterson
Perella Weinberg Partners
Lindsey M. Peters
Lee W. Purcell
Anne Stuart Flower Redd &
Edmund England Redd
Elizabeth Leatherbury Riordan
Robert W. Riordan
Olive Wilson Robinson &
Roby Robinson Jr.

Jacquelyn Fleishel Rodriguez &
Harold J. Rodriguez, Jr.
Rodriguez Family Foundation
Roger S. Firestone Foundation
David Walker Ryan
Joanna S. Ryan & Geoffrey J. Ryan
Calvin R. Schreiber
Sarah C. Semegen
Barbara K. Shea & Frank A. Shea III
Andrew J. Sinor, Jr.
B. Hanson Slaughter
Tina B. Small & Albert H. Small, Jr.
St. Elmo Club of the University of
Virginia
William A. Starshak
Elizabeth G. Staunton &
Platt B. Staunton
Faith Holly Strout Stengel &
Brian E. Stengel
Teresa A. Sullivan &
H. Douglas Laycock
Virginia M. Syer & John B. Syer
T. Rowe Price Program Charitable
Giving
Lara Milne Theriault &
Rene J. Theriault III
Anne N. Thorndike
John H. Tighe
Laura Kasselmann Turner &
Charles H. Turner IV
Vanguard Charitable Endowment
Program
Nakisha Sharpe Winston
Thomas T. Ziemann, Jr.
Stephen S. Zimmermann

In Honor Of:

Wayne D. Cozart
Lee R. Forker, Jr.
Louis C. Stengel III

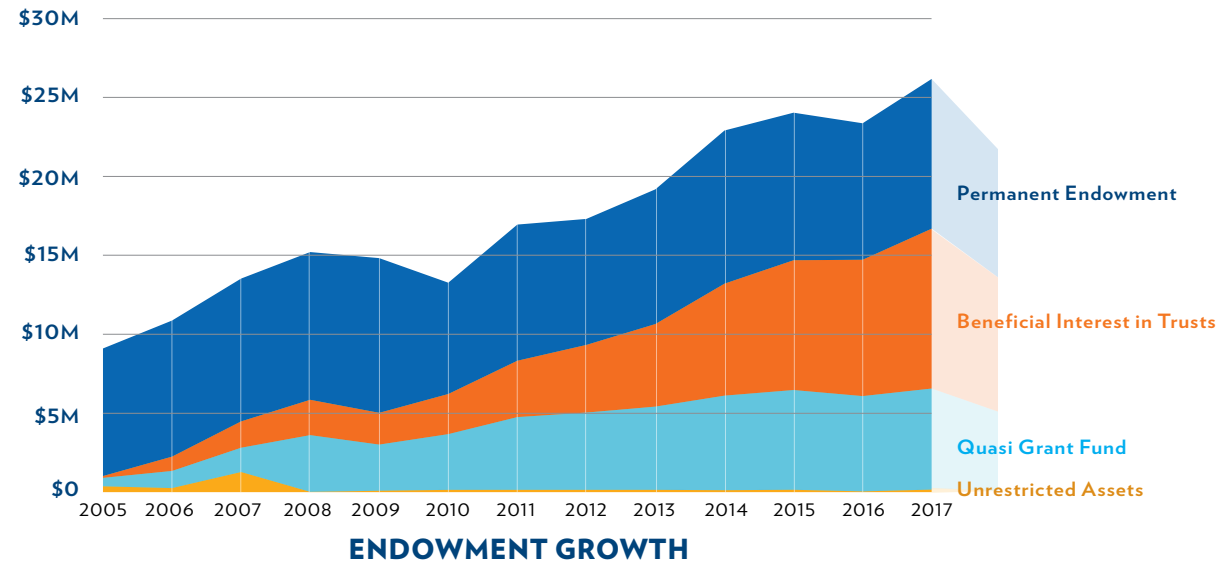
In Memoriam:

Judith E. Forker
Ernest C. Mead, Jr.
Richard W. Wiltshire

Matching Gifts

Ares Operations, LLC
Aristeia Capital
Exxon Mobil Foundation
Highmark Matching Funds
Salesforce.com Foundation
Soros Fund Charitable Foundation
UBS Matching Gift Program
Vulcan Materials Company
Foundation

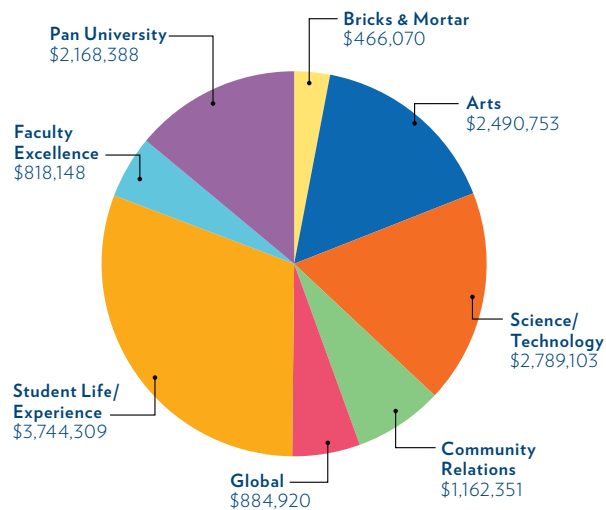
At the end of fiscal year 2017, the Jefferson Trust board had grown to 54 Donor-Trustees and one appointed member from the Alumni Association Board of Managers. The total endowment reached a record high of more than \$26 million, with the FY17 fundraising total and philanthropic cash flow both exceeding \$1.1 million. The Jefferson Trust's long-term strategy is to invest gifts and use investment income to support annual grants; the Trust has used the University of Virginia Investment Management Company (UVIMCO) for endowment management.



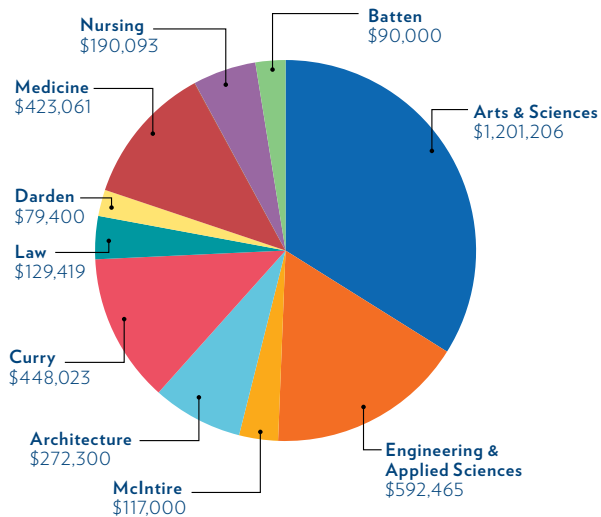
IMPACT

Over the twelve-year history of the Jefferson Trust, grants have been awarded to students, faculty, and University leadership from all schools and many different organizations, centers, and areas. These charts depict the breadth and depth of the Trust impact since inception in 2006. A grant may be counted in multiple categories.

GRANTS BY TYPE 2006-17



GRANTS BY SCHOOL 2006-17*



* Additional grants to non-school organizations such as the libraries, students organizations, the Women's Center or OpenGrounds are not represented in this chart.

As an initiative of the Alumni Association, the Jefferson Trust has also had a long history of honoring and providing recognition for our best, and brightest students, faculty, and staff members. Each year, awards are conferred upon members of the University community who have distinguished themselves in the following areas:



UVA ALUMNI ASSOCIATION'S DISTINGUISHED SERVICE AWARD - \$5,000 award
This year's recipient is Stephen Kimata.



UVA ALUMNI ASSOCIATION'S ERNEST H. ERN DISTINGUISHED STUDENT AWARD (named in honor of longtime University professor and administrator Ernest H. Ern) - \$5,000 award and Life Membership in the Alumni Association
This year's recipient is DeAnza Cook.



UVA ALUMNI ASSOCIATION'S DISTINGUISHED PROFESSOR AWARD - \$10,000 award and Life Membership in the Alumni Association
This year's recipient is Cassandra Fraser, Professor of Chemistry.



MADISON LANE AND RUGBY ROAD CHARITABLE TRUST VISUAL ARTS PRIZE - \$2,500 award
This year's recipient is Jennifer Hsiaw.



INTRAMURAL-RECREATIONAL SPORTS AWARDS
Two club teams representing the University for success in terms of competition, performance, community service, and other achievements each received \$2,500 awards. This year's recipients are the Virginia Women's Rugby Team and the Swim Club at UVA.



ABOUT THE COVER ART

Artist: Thomas Sully
Title and Date: President Thomas Jefferson, 1821 - 1822
Medium: Oil on canvas
Size: 102 1/4 x 66 inches

Courtesy of the West Point
Museum Collection, United
States Military Academy

BOARD OF MANAGERS OF THE UVA ALUMNI ASSOCIATION

N. William Jarvis, Jr., Chair
Com '81, Law '84
Washington, D.C.

Meredith B. Jenkins, Vice Chair
Col '93
New York, New York

Cory L. Alexander, Col '95
Crozet, Virginia

E. Ross Baird, Col '07
Washington, D. C.

Susan K. Blank, M.D., Col '95
Charlottesville, Virginia

Clifford W. Bogue, M.D., Col '81, Med '85
Guilford, Connecticut

Susan P. Campbell, Curry '70
Austin, Texas

Whittington W. Clement, Col '70, Law '74
(Ex-officio)
Richmond, Virginia

Raj R. Doshi, Col '99
New York, New York

Jennifer S. Draper, Col '91
Mission Hills, Kansas

John F. Harris, Com '82
Charlottesville, Virginia

Zena K. Howard, Arch '88
Cary, North Carolina

Timothy J. Ingrassia, Col '86
(Ex-officio)
Brooklyn, New York

Brian J. Leung, Col '05
(Ex-officio)
Alexandria, Virginia

J. Brady Lum, Col '89
Atlanta, Georgia

Thomas B. Mangas, Col '90
New Canaan, Connecticut

Ashley Thompson Manning, Com '97
Englewood, Colorado

Charles W. McDaniel, Col '86
Fredericksburg, Virginia

Richard T. McKinless, Com '79
Arlington, Virginia

Carolyn P. Meade, Col '94, Law '01
Charlotte, North Carolina

Courtney C. Byrd Metz, Col '04
Washington, D.C.

Mathias J. Paco, Col '95
New York, New York

Shannon O. Pierce, Col '98, Law '01
Atlanta, Georgia

Mark A. Victor Pinho, Com '99
Bronxville, New York

Christina M. Polenta, Col '09
(Ex-officio)
Chicago, Illinois

Charles Rotgin, Jr. Col '66
Charlottesville, Virginia

James E. Rutrough, Jr., Col '71
Keswick, Virginia

Louis A. Sarkes, Jr., Eng '80, Darden '85
Owing Mills, Maryland

Puja Seam, Col '00
Free Union, Virginia

Christian D. Searcy, Col '69
North Palm Beach, Florida

Elizabeth A. Smith, Col '85
St. Petersburg, Florida

Julious P. Smith, Jr., Law '68
Richmond, Virginia

Michael C. Smith, Col '92
Albany, California

James R. Socas, Col '88
McLean, Virginia

Karen R. Stokes, Col '82, Law '85
Philadelphia, Pennsylvania

Teresa A. Sullivan, President
University of Virginia
(Ex-officio)
Charlottesville, Virginia

David G. Sutton, Col '71, Law '74
Charlottesville, Virginia

Bang H. Trinh, Eng '94
Ho Chi Minh City, Vietnam

Sheryl W. Wilbon, Col '88
Bethesda, Maryland

Patricia B. Woodard, Nurs '69
Norfolk, Virginia

Amy B. Wright, Col '87
Washington, D.C.

C. Thomas Faulders III, Col '71
President
Charlottesville, Virginia



AN INITIATIVE OF THE UNIVERSITY OF VIRGINIA ALUMNI ASSOCIATION

P.O. Box 400314 • Charlottesville, VA • 22904 • 434-243-9001 • jeffersontrust.org