

**Patriot Foundation**

**North Carolina Patriot Star Family Scholarship Program**

**Reporting Period: 1 Jan - 31 Dec 2023**

1. Introduction.
  - a. Patriot Foundation (PF) operates as a contractor for the University of North Carolina (UNC), and receives funds appropriated under Session Law 2021-180, as modified by SL 2022-6 and SL 2022-71, to establish and administer scholarships under the NC Patriot Star Family Scholarship Program.
  - b. This report is provided to the University of North Carolina as the disbursing agency, pursuant to provisions of the NCAC and the above cited legislation, for further distribution to the Joint Legislative Education Oversight Committee, the Senate Appropriations Committee on Education/Higher Education, the House Appropriations Committee on Education, and the Fiscal Research Division as required.
  - c. PF fiscal year is the calendar year; this report provides information on state funds received during CY 2023.
  - d. Single audit will be forwarded when completed, not later than 31 October 2024.
2. Funding Overview. In CY 2023, the Patriot Foundation retained funds from NC BY 22-23, and received new funds from NC BY 23-24.
  - a. Funds from NC BY 22-23
    - i. At the start of CY 2023, PF retained \$366,241 in Star program funds.
    - ii. \$332,800 was disbursed as scholarships for Fall 23, and \$33,441 were spent for operating expenses between Jan-Jun 2023.
  - b. Funds from NC BY 23-24.
    - i. PF received \$700,000 on 28 Jul 2023. These funds are required to be encumbered NLT 30 Jun 2024.
    - ii. A total of \$301,080 was disbursed as scholarships for Spring 24, and \$22,956 was used for operating expenses between Jul-Dec 2023.
    - iii. At the end of the calendar year, PF retained \$375,964 in funds for use by the end of the Budget year on Jun 30, 2024.
3. Program Administration.
  - a. For the Fall semester of 2023, we disbursed scholarship funds in two ways.
    - i. \$154,700 was disbursed through our network of partner organizations. These partners are 501 (c) (3) entities which support some of the most deployed units in the U.S. military, all based here in NC. This was the same model as was used in previous years of this program, beginning with the "pilot year" 2020-2021.
    - ii. \$178,100 was disbursed directly to recipients by the Patriot Foundation, through the NCSEAA and paid into student bursar accounts at each institution.

- b. For the Spring semester of 2024, we began exclusively disbursing state funds from the Patriot Foundation through NCSEAA directly to recipients at the institutions where they study. We have hired dedicated personnel to administer scholarships with state funds; contracted with a private firm to manage our application portal and database; contracted with the NC State Educational Assistance Authority to serve as our fiscal agent to the schools that they service; and hired an accounting firm qualified to conduct a single audit as required by subchapter 03M of the North Carolina Administrative Code. This infusion of expertise, as well as access to a network of relationships with the bursars and coordinators of veterans' affairs of many colleges and universities across the state, ensures we have the capacity to manage current levels of funding and more, while keeping administrative costs very reasonable. We are confident that we have developed a system that allows us to serve as broad a constituency as possible, verify compliance with state requirements, efficiently collect and manage data, protect user privacy, and scale as necessary.
- 4. Results.
  - a. During calendar year 2023, the Patriot Foundation spent \$690,277 in NC state funds. Of this, \$56,397 (8.2%) was spent on operating expenses.
  - b. We administered \$633,880 in scholarships, funding 262 semesters at an average of \$2419 apiece.
  - c. These scholarships were used at 37 different institutions across the state, with about seventy percent of recipients in the UNC system, and the remainder split between Community Colleges and private colleges.
- 5. Potential Changes to Legislation.
  - a. The technical corrections refining the guidance on which institutions qualify as eligible for the Star program have been very helpful in serving the broadest constituency possible.
  - b. We are currently administering a separate scholarship program on behalf of the state for veterans and their families, funded with non-recurring federal dollars. This program is targeted at lower income households and is focused on helping some of our more vulnerable citizens recover from COVID-related learning loss. As our outreach expands across the state and into counties away from large concentrations of active duty and retirees, we are finding a constituency that is likely to be larger than we can accommodate in the future as these non-recurring funds expire. We believe this program is having the effect the legislature intended, and we believe there is room to do even more.
- 6. The Point of Contact at the Patriot Foundation is Barry Huggins, [bfhuggins@gmail.com](mailto:bfhuggins@gmail.com).



Barry F. Huggins  
Director, North Carolina State Funding  
Patriot Foundation

# Fall 2023 Star Program Awards Final Report

As of 12/6/2023

Total Scholarships Awarded: 137

Total Funds Awarded: \$332,800.00

Relationship to Service Member	Total	Percentages
Child	129	94%
Self	5	4%
Spouse	3	2%
<b>Grand Total</b>	<b>137</b>	<b>100%</b>

Branch of Service	Total	Percentages
Air Force	17	12%
Army	96	70%
Civil Service	6	4%
Coast Guard	2	1%
Contractor	1	1%
Marine Corps	9	7%
Navy	6	4%
<b>Grand Total</b>	<b>137</b>	<b>100%</b>

Gender	Total	Percentages
Female	70	51%
Male	67	49%
<b>Grand Total</b>	<b>137</b>	<b>100%</b>

Age	Total	Percentages
17-21	119	87%
22-25	10	7%
26-30	1	1%
30s	3	2%
40s	3	2%
50s	1	1%
<b>Grand Total</b>	<b>137</b>	<b>100%</b>

County of Origin	Total
Cabarrus	1
Carteret	1
Catawba	1
Chatham	1
Columbus	1

Craven	1
Cumberland	43
Gaston	1
Guilford	1
Harnett	10
Hoke	5
Iredell	1
Johnston	1
Lee	8
Lincoln	1
Mecklenburg	2
Moore	22
Onslow	6
Pamlico	1
Pasquotank	1
Pender	4
Randolph	1
Robeson	3
Sampson	2
Stanly	1
Union	2
Wake	10
Washington	1
Wayne	1
Wilkes	2
(blank)	1
<b>Grand Total</b>	<b>137</b>

<b>Type of Institution</b>	<b>Total</b>	<b>Percentages</b>
NC Community College	17	12%
Private	16	12%
UNC System	103	75%
Unknown	1	1%
<b>Grand Total</b>	<b>137</b>	<b>100%</b>

<b>Institution</b>	<b>Total</b>
Appalachian State University	11
Barton College	1
Campbell University	4
Cape Fear Community College	2
Carteret Community College	1
Central Carolina Community College	3
Craven Community College	1
Duke University	1
East Carolina University	12

Elon University	1
Fayetteville State University	3
Fayetteville Technical Community College	5
High Point University	1
Lees-McRae College	1
Methodist University	4
Montgomery Community College	1
North Carolina Agricultural and Technical State University	2
North Carolina State University	22
North Carolina Wesleyan University	1
Other	1
Sandhills Community College	4
St. Andrews University	1
University of North Carolina at Chapel Hill	14
University of North Carolina at Charlotte	9
University of North Carolina at Greensboro	7
University of North Carolina at Pembroke	4
University of North Carolina at Wilmington	13
Wake Forest University	1
Wake Technical Community College	1
Western Carolina University	2
Winston-Salem State University	3
<b>Grand Total</b>	<b>137</b>

# Spring 2024 STAR Program Awards Final Report

As of 3/21/2024

Total Scholarships Funded: 125

Total Funds Awarded: \$301,080.00

Relationship to Service Member/Veteran	Total	Percentages
Child	114	91%
Self	5	4%
Spouse	6	5%
<b>Grand Total</b>	<b>125</b>	<b>100%</b>

Branch of Service	Total	Percentages
Air Force	14	11%
Army	89	71%
Coast Guard	2	2%
Marine Corps	15	12%
Navy	5	4%
<b>Grand Total</b>	<b>125</b>	<b>100%</b>

Gender	Total	Percentages
Female	68	54%
Male	57	46%
<b>Grand Total</b>	<b>125</b>	<b>100%</b>

Age	Total	Percentages
17-21	106	85%
22-25	8	6%
26-30	1	1%
30s	5	4%
40s	4	3%
50s	1	1%
<b>Grand Total</b>	<b>125</b>	<b>100%</b>

County of Origin	Total
Cabarrus	1
Carteret	2
Catawba	1
Chatham	1
Craven	1
Cumberland	30
Duplin	1
Gaston	1

Guilford	1
Harnett	15
Hoke	6
Iredell	1
Jackson	2
Johnston	3
Lee	6
Lincoln	1
Moore	11
New Hanover	1
Onslow	10
Pamlico	1
Pasquotank	1
Pender	4
Randolph	1
Sampson	2
Stanly	1
Union	2
Wake	11
Washington	1
Watauga	1
Wayne	4
Wilkes	1
<b>Grand Total</b>	<b>125</b>

<b>Type of Institution</b>	<b>Total</b>	<b>Percentages</b>
NC Community College	17	14%
Private	19	15%
UNC System	89	71%
<b>Grand Total</b>	<b>125</b>	<b>100%</b>

<b>Institution</b>	<b>Total</b>
Appalachian State University	7
Barton College	1
Brevard College	1
Campbell University	5
Cape Fear Community College	2
Carteret Community College	1
Central Carolina Community College	1
Coastal Carolina Community College	3
Craven Community College	1
Duke University	1
East Carolina University	18
Elon University	1
Fayetteville State University	3

Fayetteville Technical Community College	3
High Point University	2
Hood Theological Seminary	1
Lees-McRae College	1
Methodist University	1
Mid-Atlantic Christian University	1
Montgomery Community College	1
North Carolina State University	17
North Carolina Wesleyan University	1
Queens University of Charlotte	1
Sandhills Community College	1
St. Andrews University	1
University of North Carolina at Chapel Hill	13
University of North Carolina at Charlotte	6
University of North Carolina at Greensboro	5
University of North Carolina at Pembroke	3
University of North Carolina at Wilmington	11
Wake Forest University	1
Wake Technical Community College	2
Wayne Community College	2
Western Carolina University	3
Winston-Salem State University	3
<b>Grand Total</b>	<b>125</b>