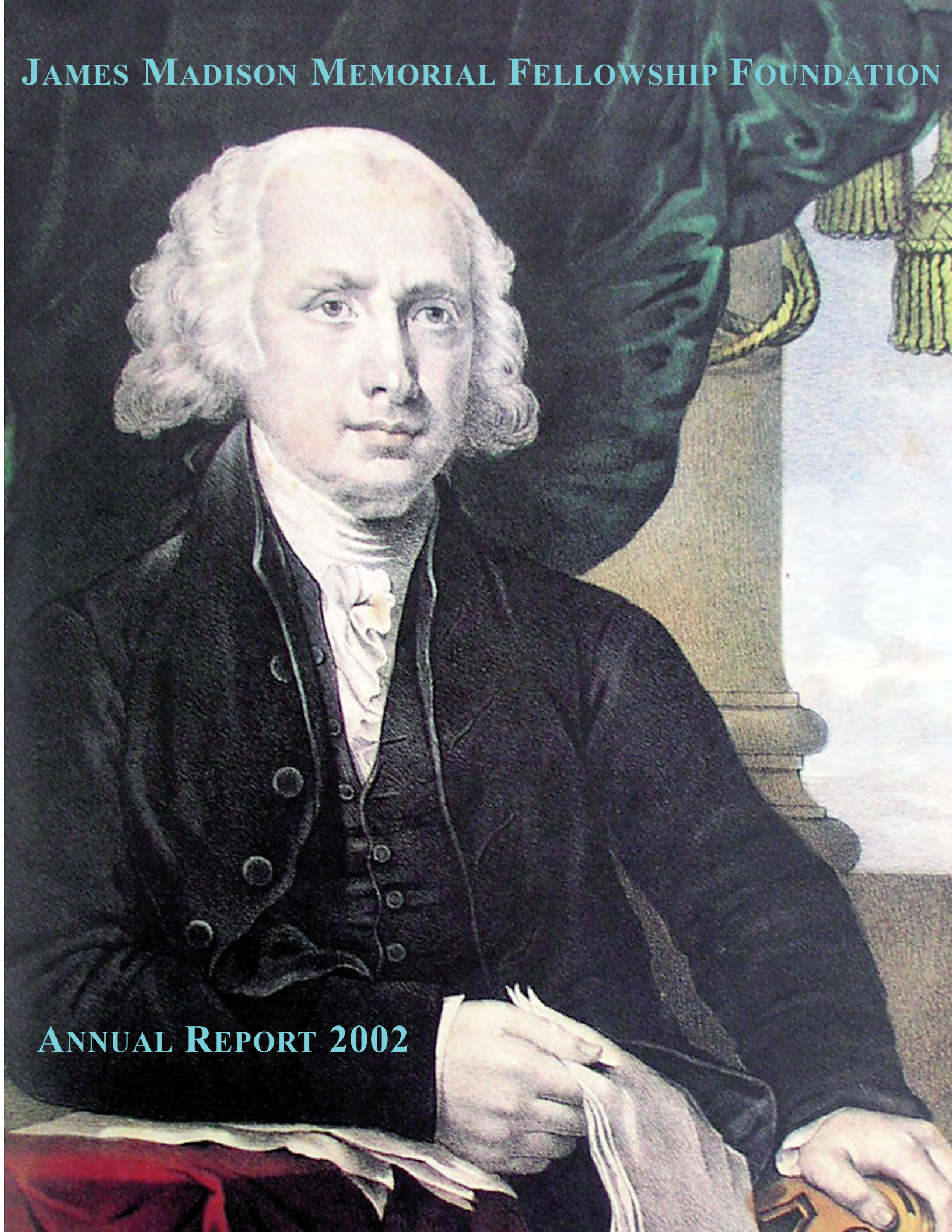


JAMES MADISON MEMORIAL FELLOWSHIP FOUNDATION



ANNUAL REPORT 2002



James Madison Jr.

JAMES MADISON
MEMORIAL FELLOWSHIP
FOUNDATION

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to request a fellowship application, please contact

James Madison Fellowship Program
P.O. Box 4030
Iowa City, Iowa 52243
toll free: 800-525-6928
e-mail: madison@act.org

James Madison Memorial Fellowship Foundation

2002 Annual Report



Dolley Payne Todd Madison by Gilbert Stuart

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President's Letter



The Declaration of Independence is often called the promise and the Constitution the fulfillment of that promise. This year even those who seek to destroy us, when captured, have fled to the protection of the promise and the fulfillment. The Taliban and al Qaeda detainees in Guantanamo Bay, the accused on trial for helping the 9/11 hijackers and the American al Qaeda on trial in Virginia all seek the protection of our "Fundamental Law." And what is important is that law provides a fairness and evenhandedness found nowhere else in the history of the world.

The first two years of the 21st century have seen an increased public interest in our fundamental law. Many events including the 2000 presidential elections and several of the 2002 Senate elections have contributed to that interest. This has, in turn, provided a fertile field for our James Madison Constitutional scholars in classrooms throughout the nation. They have been asked about the Electoral College, the jurisdiction of the Supreme Court over federal elections held under state guidelines, the place of military tribunals in our judicial system, the power to declare war and the relation between the Senate and the President in appointing Federal judges. What a great year-even century to be a constitutional scholar.

I have urged our Fellows to accept the role of Constitutional Scholar not only in their classrooms-but also in their school districts and communities. They are some 600 strong and their professional skills and knowledge have never been more in demand. Their teaching in and out of the classroom makes us better educated and thus a stronger nation.

A handwritten signature in blue ink that reads "Paul A. Yost, Jr." The signature is fluid and cursive, with a large, stylized initial 'P'.

Paul A. Yost, Jr.
Admiral USCG (Ret.)
President

Education Programs

James Madison Fellowships

Fellowship awards constitute the core of the Foundation's programs. The Foundation conducts an annual nationwide competition to select James Madison Fellows. Fellows are selected for their academic achievements and for their desire to be more knowledgeable secondary school teachers of social studies and American history and government.

Fellows must have demonstrated an interest in pursuing a course of graduate study which emphasizes the Constitution and Bill of Rights and have demonstrated a willingness to devote themselves to teaching and to civic responsibility. The Foundation annually selects at least one James Madison Fellow from each state, the District of Columbia, and the Commonwealth of Puerto Rico, and considered as a single entity, Guam, the Virgin Islands, American Samoa, the Trust Territories of the Pacific Islands, and the Commonwealth of the Northern Marianas in which there are at least two resident applicants who meet the minimum criteria. An independent review committee appointed by the Foundation evaluates all valid applications and recommends to the Foundation, for appointment as James Madison Fellows, at least one outstanding applicant from each state. James Madison Fellowships are awarded to master's degree candidates as follows:

Junior Fellowships are awarded to college seniors and graduates who wish to become secondary school

teachers of American history, American government, or social studies for full-time graduate study toward a master's degree. Junior Fellows are eligible for a maximum stipend of up to \$24,000 prorated over the period of study. In no case can the stipend exceed \$12,000 for each year of study.

Senior Fellowships are awarded to experienced secondary school teachers for part-time graduate study toward a master's degree during summer session or in evening and weekend programs. Financial support for Senior Fellows is limited to five calendar years and up to a maximum stipend of \$24,000 prorated over the period of study.

Fellowship recipients may attend any accredited university in the United States with a master's degree program offering courses or training that emphasize the origins, principles, and development of the Constitution and its comparison with constitutions and histories of other forms of government. The Foundation reviews each Fellow's proposed course of study for an appropriate balance of constitutional subject matter and other courses based on the Fellow's goals and background.

All James Madison Fellows must agree to teach full time in secondary school for at least one year for each year of assistance. If this requirement is not met, the recipient must reimburse the Foundation for all financial assistance plus interest. The Foundation strongly encourages Fellows to teach in their selection state when they complete their education.



2002 Fellowship Program

2002 James Madison Fellows

The Foundation conducted its tenth nationwide competition for fellowships during 2002. From eligible applicants, 56 individuals were selected as James Madison Fellows. Funding from private donors allowed the Foundation to award additional fellowships in several states.

The following individuals served as members of the 2002 Fellow Selection Committee; they independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships:

Dr. Stephen G. Bragaw

Assistant Professor of Government
Sweet Briar College
Sweet Briar, Virginia

Dr. Lucas Morel

Politics Department
Washington and Lee University
Lexington, Virginia

Dr. Daniel Feller

Professor of History
University of New Mexico
Albuquerque, New Mexico

Mr. Kevin J. Neal

Teacher, 1992 James Madison Fellow
West Des Moines Valley High School
West Des Moines, Iowa

Ms. Glenna Humphries

Teacher, 1995 James Madison Fellow
South Plantation High School
Plantation, Florida

Mr. David K. Peterson

Teacher, 1996 James Madison Fellow
Niobrara County High School
Lusk, Wyoming

Mr. Fred Lamora

Teacher, 1996 James Madison Fellow
Casa Roble High School
Orangevale, CA

Dr. Linda Przbyszewski

Associate Professor of History
University of Cincinnati
Cincinnati, Ohio

Ms. Pier W. Larsen

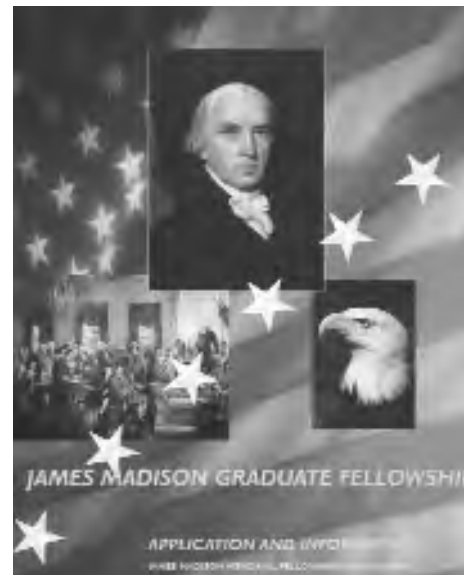
Teacher, 1997 James Madison Fellow
Creekview High School
Dallas, Texas

Dr. Kathleen Anderson Steeves

Associate Professor of Education
George Washington University
Washington, D.C.

Dr. Howard L. Lubert

Assistant Professor of Political Science
James Madison University
Harrisonburg, VA 22807



In 2002, the Foundation updated the Fellowship Application. The full application is also available on the Foundation's internet site.

2002 Fellowship Awardees

Senior Fellows (current teachers)

(Listed by state of legal residence, name, and school)

California	Tracy L. Nelson	Deer Valley High School; Antioch, CA
California	Nancy G. Olson	Hayward High School; Hayward, CA
Connecticut	Wendy E. Carrafiello	Amity Regional Senior High School; Woodbridge, CT
Delaware	Robin S. Lober	Charter School Of Wilmington; Wilmington, DE
Georgia	David S. Wilson	Armuchee High School; Rome, GA
Idaho	Lisa L. Kinnaman	Capital High School; Boise, ID
Illinois	Vanessa Lal	Adlai E. Stevenson High School; Lincolnshire, IL
Indiana	Janet L. Woods	Saint Malachy Parish School; Brownsburg, IN
Iowa	Jason G. Shackett	Johnston High School; Johnston, IA
Kansas	Michael K. Williams	Topeka High School; Topeka, KS
Kentucky	Michael L. Ryan-Kessler	Liberty High School; Louisville, KY
Louisiana	Erin L. O'Connell	Metairie Park Country Day School; Metairie, LA
Maine	Thomas V. McGarvey	Central Aroostook High School; Mars Hill, ME
Massachusetts	Patricia A. Mosley	Watertown Middle School; Watertown, MA
Michigan	Mark N. Oglesby	Howell High School; Howell, MI
Michigan	Eric L. Wood	Mott Middle College; Flint, MI
Minnesota	Jennifer M. Donovan	Ashland High School; Ashland, MA
Mississippi	Melissa M. Harris	Pass Christian High School; Pass Christian, MS
Missouri	Patrick P. Schwalbe	Fox Senior High School; Arnold, MO
Montana	Cynthia M. Wilondek	Billings Public Schools; Billings, MT
Nebraska	Joseph R. Schlegelmilch	Lincoln East High School; Lincoln, NE
Nevada	Todd C. Petersen	Green Valley High School; Henderson, NV
New Hampshire	Donald R. Duba	Plymouth Regional High School; Plymouth, NH
New Jersey	Darcy L. Daniels	Lake Riviera Middle School; Brick, NJ
New Jersey	Meghan K. Mikulski	Cherry Hill High School East; Cherry Hill, NJ
New Mexico	Peggy S. Jackson	Moriarty High School; Moriarty, NM
New Mexico	Emily Brenda Ortega	Robertson High School; Las Vegas, NM
New York	Christina B. Morado	Intermediate School 90; New York, NY
North Carolina	Robert K. Hight	Terry Sanford Senior High School; Fayetteville, NC
North Dakota	Daniel L. Wolf	West Fargo Middle School; West Fargo, ND
Ohio	Sara E. Arcaro	Rocky River High School; Rocky River, OH
Ohio	Eric J. Rouse	Swiss Hills Career Center; Woodsfield, OH
Oklahoma	Medea G. Bendel-Owens	Bishop Kelley High School; Tulsa, OK
Oregon	Catherine M. Saks	David Douglas High School; Portland, OR
Pennsylvania	Kathleen B. Fitzpatrick	Holy Cross School; Springfield, PA
Rhode Island	Timothy J. Cahalan	Westport High School; Westport, MA
Tennessee	Nathaniel G. Heffter	Antioch High School; Antioch, TN
Texas	Andrew T. Kuhn	Alamo Heights High School; San Antonio, TX
Texas	Jennifer R. McEwan	Cedar Park High School; Cedar Park, TX
Texas	Nicole L. Michener	Bussey Middle School; Garland, TX
Texas	Bridget L. Trawhon	West Sabine High School; Pineland, TX
Utah	Laird J. Small	Pusan American School; South Korea
Vermont	John A. Zuccotti	Mount Saint Joseph Academy; Rutland, VT
Washington	Jennifer A. Reidel	Lynden High School; Lynden, WA
Wisconsin	Daniel F. Lamb	Plymouth High School; Plymouth, WI
Wyoming	Kristy L. Richmond	Riverton High School; Riverton, WY

2002 Fellowship Awardees continued

Prospective Teachers (Junior Fellows)

(Listed by state of legal residence, name, and undergraduate school)

Alabama	Nicole L. Jordan	Birmingham-Southern College; Birmingham, AL
Arkansas	Lora K. Blankenship	University of Arkansas, Fayetteville; Fayetteville, AR
Colorado	William P. Jaeger	Dartmouth College; Hanover, NH
Florida	Timothy L. Tinnesz	University of Florida; Gainesville, FL
Florida	Jocelyn D. Tobin	University of Florida; Gainesville, FL
Maryland	Eden H. Segal	Northwestern University; Evanston, IL
New York	Patricia M. Spinelli	Fordham University; Bronx, NY
Pennsylvania	Jennifer S. Mitnick	Brown University; Providence, RI
South Carolina	Nathan J. Saunders	University of South Carolina, Columbia; Columbia, SC
Virginia	Cheryl A. deMember	Randolph-Macon Woman's College; Lynchburg, VA

Ms. Olsen's fellowship, the Henry Salvatori-James Madison Fellowship, is endowed by the Henry Salvatori Foundation of Los Angeles, California.

Ms. Mikulski's fellowship, the Fairleigh S. Dickinson, Jr.-James Madison Fellowship, is endowed by the Fairleigh S. Dickinson, Jr. Foundation, Inc. of Roseland, New Jersey.

Ms. Ortega's fellowship is funded by an anonymous foundation from New Mexico.

Ms. Fitzpatrick's fellowship, "The Fellow's Fellowship," is funded by contributions from current and alumni James Madison Fellows.

Ms. McEwan's fellowship is funded by the Hatton W. Sumners Foundation of Dallas, Texas.

Ms. Michener's fellowship is funded by the Hatton W. Sumners Foundation of Dallas, Texas.

Ms. Trawhon's fellowship is funded by the Rockwell Fund, Inc. of Houston, Texas.

Mr. Small's fellowship is funded by the J. Willard and Alice S. Marriott Foundation of Washington, D.C.

Mr. Tinnesz's fellowship, the J. Seward Johnson, Sr.-James Madison Fellowship, is endowed by the Atlantic Foundation of Princeton, New Jersey.

2002 Summer Institute on the Constitution



Fellows visiting Arlington National Cemetery.



Jennifer S. Mitnick '02 (PA) and Susan D. Parshley, 01 (ME) walking on the grounds of Montpelier.

The 2002 Summer Institute on the Constitution was held from July 1, 2002 to July 26, 2002. A total of 62 James Madison Fellows, representing nearly every state, attended the Institute. One of the participants was a professor from the University of Havana, Havana, Cuba.

The Institute took place on the campus of Georgetown University and was the tenth annual Institute held by the Foundation. Georgetown University awarded six graduate credits to each participant.

The Program. The course offered at the Institute was History 520-10, "Foundations of American Constitutionalism." The course examined in depth the intellectual, cultural, social, and political context of the creation of constitutional government in the American colonies and in the American Republic during and after the Revolution. The course blended perspectives of history and political science as participating Fellows engaged in close study of contemporary source materials such as the debates in the Constitutional Convention, *The Federalist*, and Antifederalist writings, as well as the best current scholarship on the subject.

Each academic day began with a one and one half-hour lecture given by one of the four Institute professors. Following the lecture and a brief break, the group divided into four discussion groups where the daily assigned readings were examined in detail. Following the discussion groups, everyone rejoined to have lunch in a private dining room. During lunch, informal discussion continued between the Fellows and the professors.

The Institute included tours of historic sites associated with the founding period, specifically Mt. Vernon, Monticello, and Montpelier. Course lectures were

given at these sites. One day was spent at the Supreme Court where Associate Justice Stephen G. Breyer addressed the Fellows about the Supreme Court and the judiciary. Professor Edward Smith of the American University gave special tours of Arlington Cemetery, the African American Presence in Washington, D.C., and Capitol Hill.

The Fellow's academic progress was evaluated through three written papers/examinations. Fellows were also evaluated on class participation. Every participant in the 2002 Institute completed the course successfully.

The Foundation staff handled all administrative aspects of the Institute including working with the University on housing and food services. Additionally, the staff worked with individual Fellows in handling personal issues that may have arisen.

Faculty. The course was directed and taught by Dr. Herman Belz, the Foundation's Academic Advisor and Professor of History at the University of Maryland, Dr. Suzette Hemberger, Independent Scholar, Dr. Jeffrey H. Morrison, Assistant Professor of Government, Regent University, and Dr. Kevin R. Hardwick, Assistant Professor of History, James Madison University. For the Institute, they hold appointments as Adjunct Professors of History at Georgetown University.

Conclusion. The Fellows were academically focused and worked hard during the 2002 Institute. The academic program continues to be rigorous and challenging for the participants. Many collegial friendships were made among the Fellows.



Summer Institute Professors (left to right) Jeffrey H. Morrison, Herman Belz, Kevin R. Hardwick, Suzette Hemberger.



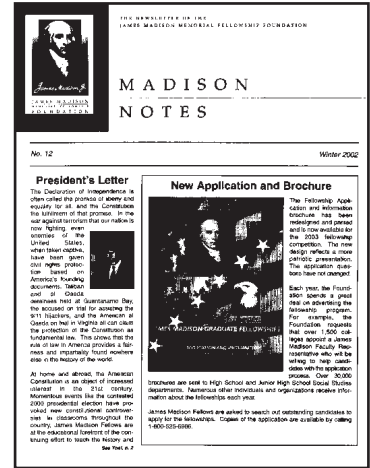
2002 Summer Institute Participates on the steps of James Madison's Montpelier.

Communication to the Fellows

The Foundation publishes a newsletter, *Madison Notes*, which is distributed to all James Madison Fellows, as well as to friends and associates of the Foundation. This publication is intended to convey news about the Foundation, about the Fellows, and about developments related to teaching and scholarship on the Constitution.

Each year the Foundation publishes an updated “**Fellows Directory**” which is distributed to each Fellow.

The Foundation also operates a home page on the internet to help publicize the program and to communicate with James Madison Fellows. The Foundation’s internet address is: <http://www.jamesmadison.com>.



2002 James Madison Symposium

The annual James Madison Symposium is held each year in July so that all James Madison Fellows can further their scholarship on the Constitution and renew acquaintances in the process. The 2002 Symposium was held on July 12, 2002 in the Hart Senate Office Building. The topic of the Symposium was "Patriotism and Multiculturalism: Teaching American History in Wartime."

The Foundation invited Dr. Robert L. Stevens, Professor of Middle Grades and Secondary Education at Georgia Southern University and Dr. David Warren Saxe, Associate Professor of Education at Pennsylvania State University to each provide a 20 minute lecture on the topic. Dr. Herman Belz, the Foundation's Academic Advisor acted as moderator. Professor Belz invited question to the panel from those in attendance. A reception followed the presentations.



Development

The Foundation is currently able, through income from its endowment and from gifts received or promised, to offer at least one domestic fellowship in each state perpetually. It is the desire of the Foundation's board to award a minimum of two fellowships in each state annually. The Foundation has now begun to implement this plan in the most populous states.

Since the Foundation endowment covers all overhead and administrative costs, each donation to the Foundation is devoted solely and directly to funding the graduate study of experienced and aspiring teachers. Donations may be directed to the support of fellowships in particular states or for fellowships in a national pool--all of which are selected according to the consistent criteria and standards governing the Foundation's selection process.



James Madison-Bill of Rights Commemorative Coins

A special series of commemorative coins honoring James Madison and the Bill of Rights was authorized by Congress and minted by the United States Mint in 1993. Surcharges, added to the retail price of the coins, were provided to the Foundation's endowment. In recognition of the large amount of funds raised by the sale of the coins, the Foundation acknowledges its gratitude to the coin collectors of America who purchased these coins in support of the education programs of the Foundation and offers this acknowledgement in each annual report.

Donations and Contributions

During FY 2002, the Foundation's programs operated with the support of grants, contributions or endowment support received for the fellowships and the Summer Institute on the Constitution from the following:

The Atlantic Foundation
The Charleston Mint
Fairleigh S. Dickinson, Jr. Foundation, Inc.
Federal Employees Workplace Campaign
Harbor Branch Oceanographic Institute, Inc.
J. Willard and Alice S. Marriott Foundation
Rockwell Fund, Inc.
The Henry Salvatori Foundation
William & Jane Schloss Family Foundation
Hatton W. Sumners Foundation
Anonymous Foundation, New Mexico



James Madison Education Fund, Inc.

The James Madison Education Fund, Inc. is an independent not-for-profit organization created to support the goals of the James Madison Memorial Fellowship Foundation. The Fund periodically grants to the Foundation funds to pay for programs offered by the Foundation. As of September 30, 2002, the Fund had assets of \$4,568,618.

James Madison Memorial Fellowship Foundation FY2002 (September 30, 2002)

Balance Sheet

<u>Assets</u>		<u>Liabilities</u>	
Undisbursed Balance		Current Liabilities	
U.S. Treasury Account	987,278	Accounts Payable	<u>\$38,418</u>
		Total Current Liabilities	\$38,418
Accounts Receivable		Equity (see note 4)	
Imprest Fund	\$800	Beginning Balance	\$37,322,208
Receivables	33,955	Net Change (loss)	<u>655,257</u>
Interest on Investments	298,683	Total Equity	\$37,977,466
Total Current Assets	\$1,320,716		
Fixed Assets			
Long-term Investments (Treasuries)	<u>\$36,695,168</u>		
Total Net Fixed Assets	\$36,695,168		
Total Assets (note 2)	<u>\$38,015,884</u>	Total Liabilities & Equity	<u>\$38,015,884</u>

Income and Expense Statement

Income:		Expenses:	
Interest on Investments	<u>\$2,716,803</u>	Fellowship Expense	\$1,370,827
Total Income	<u>\$2,716,803</u>	Operating Expenses (rent, salaries, etc.)	664,903
		Fund Raising Expense	25,815
		Grant to Education Fund	<u>0</u>
		Total Expenses	<u>\$2,061,545</u>
		Net Income (loss)	<u>\$655,257</u>

Note 1: An independent not-for-profit organization, the James Madison Education Fund, Inc. provides additional financial support for the program of the Foundation. The total assets of this fund on September 30, 2002 were \$4,568,618.

Governance

The Foundation is governed by a Board of Trustees consisting of thirteen members. Twelve--two members of the Senate, two members of the House of Representatives, two members of the federal judiciary, one governor, two members of the general public and three members of the academic community--are appointed for six-year terms by the President of the United States. The Secretary of Education serves as an ex officio member. With the exception of the federal judges and Secretary of Education, board membership is evenly divided between political parties.



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Chairman
U. S. Senator, MA*



*Orrin G. Hatch
Treasurer
U.S. Senator, UT*



*Wayne Allard
U.S. Senator, CO*



*Marc R. Pacheco
State Senator
State of
Massachusetts
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*Alan G. Lowy
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*Morris S. Arnold
Judge, U.S. Court
of Appeals
8th Circuit
Little Rock, AR*



*A.E. Dick Howard
Professor
University of
Virginia
Charlottesville, VA*



*Louise L. Stevenson
Professor
Franklin &
Marshall College
Lancaster, PA*



*Jose' Cabranes
Judge, U.S. Court
of Appeals
2nd Circuit
New Haven, CT*



*Rod Paige
Secretary of
Education
Ex Officio*



*David O. Bickart
Counsel
Kaye, Scholer,
Fierman, Hays &
Handler*



2002 Board of Trustees Meeting.

James Madison Fellows



Fellows attending the the annual Board of Trustees meeting.



Fellows touring Arlington Cemetery with Professor Ed Smith of the American University.



Sen. Hatch addressing Fellows at the board meeting.



The daily lecture held prior to touring George Washington's Mount Vernon.



Fellows in the great hall of the U.S. Supreme Court.



Justice Breyer addressing Fellows at the Supreme Court.



Fellows relaxing at Montpelier's Education Center.



Korri D. Hogan '00 (ID) asks the trustees a question.

Foundation Staff

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President

Herman Belz
Academic Advisor to the President

Norma J. Claytor
Special Assistant and Office Manager

Lewis F. Larsen
Vice President and Director of Programs

Sheila Osbourne
Academic Assistant

Elizabeth G. Ray
Program Analyst

Stephen W. Weiss
Director of Administration and Finance

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Iowa City, Iowa 52243-4030

1-800-525-6928

1-319-337-1204 (Fax)

e-mail: madison@act.org