James Madison Memorial Fellowship Foundation

2004 Annual Report



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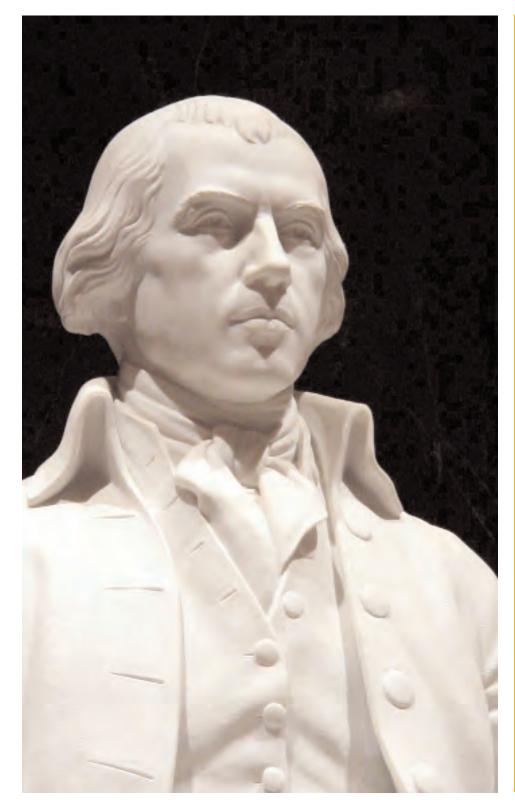


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President's Letter



Some years ago at the dedication of the Franklin D. Roosevelt Memorial in Washington, D.C., I heard his son Elliott describe his father something like this - "He loved liberty and he loved peace but he had to choose between the two". So it seems that almost every President of the United States has had to do so since World War II. Korea, Vietnam, Desert Storm, Afghanistan and Iraq have all presented a threat to liberty that was addressed at the price of peace.

But today international terrorism has turned this on its head. Terrorism is requiring governments to restrict the liberties of populations in order to try to keep the peace. The three branches of our government are trying to determine how much of our liberty we must give up through such things as airline security, barriers around government buildings and the Patriot Act in order to ensure against a domestic terrorist attack. So far the restrictions of our liberties have been few and a small price to pay for protection against further attacks since 9/11. I am confident that our government will be judicious in its restriction of our liberties. That is the strength of our constitutional democracy and of our two-party system. It is a self-correcting system. Even though the Founding Fathers never dreamed of terrorism replacing war, the system they left us is working very well in accommodating it. The Constitution is alive and well in this age of terrorism as it was in Franklin D. Roosevelt's day and James Madison's day.

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, 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:

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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-



Fellows at the U.S. Supreme Court



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.

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2004 Fellowship Program



2004 Fellowship Selection Committee reading applications

2004 James Madison Fellows

The Foundation conducted its thirteenth nationwide competition for fellowships during 2004. From eligible applicants, 54 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 2004 Fellow Selection Committee; they independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships:

Ms. Molly K Bruzewski

1996 James Madison Fellow Teacher, Vassar High School Vassar, MI

Dr. Paul G. E. Clemens

Professor, Department of History Rutgers, The State University of New Jersey New Brunswick, NJ

Mr. Douglas N. Cutchins

1994 James Madison Fellow Director of Social Commitment Grinnell College Grinnell, IA **Dr. Stephen Frank** Senior Director of Research National Constitution Center Philadelphia, PA

Mr. Thomas S. O'Hare 2000 James Madison Fellow Teacher, Wilson Hall Sumter, SC

Dr. Leslie W. Skinner

1992 James Madison Fellow Education Associate, Social Studies/Assessment Columbia, SC

Dr. Susan Mitchell Sommers

Associate Professor of History St. Vincent College Latrobe, PA **Dr. Camille A. Stillwell** National Scholarships Coordinator University of Maryland College Park, MD

Ms. Victoria Vergara 1998 James Madison Fellow Teacher, Thomas Edison High School Alexandria, VA

Dr. Thomas S. Vontz

1992 James Madison Fellow Assistant Professor, Department of Education Rockhurst University, Kansas City, MO

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2004 Fellowship Awardees

Current Teachers (Senior Fellows)

Listed by state of legal residence, name, and secondary school where they teach

Alaska Arizona Arkansas California California California Colorado Florida Georgia Hawaii Indiana Iowa Kansas Kentucky Maryland Maryland Massachusetts Minnesota Mississippi Missouri Montana Nebraska Nevada New Jersey New Mexico New York North Dakota Ohio Oklahoma Oregon Pennsylvania South Dakota South Dakota Tennessee Texas Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming

Anthony R. Jensen Edward W. Denny Brandie K. Benton Shannon D. Hobbs Kristopher W. Kiebler Stacy E. Salz Jeffery R. Appelhans Regina F. Stuck Marie A. Fiorentino Alyson J. Fink James P. Kendall Noah M. Lawrence Curtis R. White Jon K. Mansfield Daniel J. Gallagher Jaime L. Thompson Joshua C. Otlin Kathryn M. Shaughnessy Ashley R. Pollock Jill A. Villasana Bruce H. Guthrie Kevin J. Rippe Milton M. Hyams Merideth L. Getsinger Mary L. Romero Robert L. Sandler Stephanie L. Holland Stacey L. McSkimin James F. Caylor Joyce E. Garland Janet L. Ranheim Loretta L. Wellentin Barnaby D. Cook Linda M. Coslett Lisa L. Dishongh Philip L. Gensheimer Dawn L. Hauser Elizabeth LeBrun Eric V. Henderson Kevin L. Workman Joseph J. Sisler Christine E. Kadonsky Aaron J. Hinton

Wasilla High School; Wasilla, AK Tempe Preparatory Academy; Tempe, AZ Hot Springs High School; Hot Springs, AR Bernardo Heights Middle School; San Diego, CA Long Beach Renaissance High School for the Arts; Long Beach, CA Torrey Pines High School; Encinitas, CA William J. Palmer High School; Colorado Springs, CO Homestead Middle School; Homestead, FL Webb Bridge Middle School; Alpharetta, GA James B. Castle High School; Kaneohe, HI Booker T. Washington Alternative High School; Terre Haute, IN Lamoni Community School; Lamoni, IA Indian Woods Middle School; Overland Park, KS Montgomery County High School; Mt. Sterling, KY Bethesda-Chevy Chase High School; Bethesda, MD Windsor Knolls Middle School; Ijamsville, MD Hudson High School; Hudson, MA Burnsville Senior High School; Burnsville, MN DeSoto County Alternative Center; Hernando, MS Jefferson Junior High School; Columbia, MO Flathead High School; Kalispell, MT Lincoln East High School; Lincoln, NE Incline High School; Incline Village, NV Union High School; Union, NJ New Mexico Boys School; Springer, NM Stuyvesant High School; New York, NY Tahoma High School; Kent, WA SuccessTech Academy; Cleveland, OH Southeast High School; Oklahoma City, OK Sheridan High School; Sheridan, OR Lincoln Academy; Bridgeport, PA Rock Creek Grant School; Bullhead, SD Chester Area School; Chester, SD Clinton Middle School; Clinton, TN Alice Johnson Junior High School; Channelview, TX Saint Thomas High School; Houston, TX Granite High School; Salt Lake City, UT Poultney High School; Poultney, VT Lake Braddock Secondary School; Burke, VA Mead Senior High School; Spokane, WA Moorefield Middle School; Moorefield, WV Wausau West High School; Wausau, WI Centennial Junior High School; Casper, WY



2004 Fellowship Awardees, cont.

Prospective Teachers (Junior Fellows)

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

Alabama	Julie C. Bryant	Auburn University; Auburn, AL
Connecticut	Jason Vanderburgh	Boston College; Chestnut Hill, MA
District of Columbia	Christina M. Imholt	University of Chicago; Chicago, IL
Florida	Emma L. Kiziah	University of Florida; Gainesville, FL
Illinois	Ryan E. Ervin	Eastern Illinois University; Charleston, IL
Louisiana	Julie E. Harris	Loyola University New Orleans; New Orleans, LA
New Hampshire	Christopher G. Ulrich	University of Maryland-College Park; College Park, MD
New Jersey	Felice Pagnotta	Fairleigh Dickinson University; Teaneck, NJ
North Carolina	Kellie A. Wilson	North Carolina State University; Raleigh, NC
Northern Mariana Islands	Natalie P. Hill	George Mason University, Fairfax, VA
South Carolina	Patrick L. Kelly	University of South Carolina-Columbia; Columbia, SC

Ms. Hobbs' fellowship, the Henry Salvatore-James Madison Fellowship, is endowed by the Henry Salvatore Foundation of Los Angeles, California.

Mr. Keibler's fellowship is funded by an anonymous donor.

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

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

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

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

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



Fan Window at James Madison's Montpelier

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Summer Institute on the Constitution



Fellows at Arlington Cemetery



Fellows having dinner at Montpelier

The 2004 Summer Institute on the Constitution was held from June 28, 2004 to July 25, 2004. A total of 54 James Madison Fellows, representing nearly every state, attended the Institute. Additional participants were a native of Havana, Cuba and the Director of Education Programs at the National Constitution Center.

The Institute took place on the campus of Georgetown University and was the eleventh 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 halfhour 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 discussions continued between the Fellows and the professors.

The Institute included tours of historic sites associated with the Founding period, specifically Mt. Vernon,

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Monticello, and Montpelier. Course lectures were given at these sites. One day was spent at the Supreme Court where the Clerk of the Court 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 2004 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. Jeffry 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 2004 Institute. The academic program continues to be rigorous and challenging for the participants. Many collegial friendships were made among the Fellows.



Stephanie Doane of Maine



Summer Institute lecture



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.

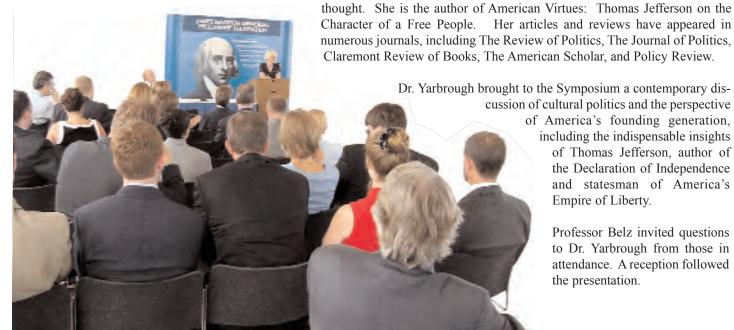


The Foundation's internet site has approximately one million visitors each year.

James Madison Symposium

The 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 2004 Symposium was held on July 11, 2004 in the Hart Senate Office Building. The topic of the Symposium was "A Jefferson for the Twenty-First Century." Professor Herman Belz, the Foundation's Academic Director acted as Master of Ceremonies at the Symposium.

The Foundation invited Dr. Jean Yarbrough, Professor of Social Studies, in the Department of Government and Legal Studies, Bowdoin College to speak at the Symposium. Dr. Yarborough specializes in political philosophy and is a leading scholar of American political



Character of a Free People. Her articles and reviews have appeared in numerous journals, including The Review of Politics, The Journal of Politics, Claremont Review of Books, The American Scholar, and Policy Review.

> Dr. Yarbrough brought to the Symposium a contemporary discussion of cultural politics and the perspective

> > of America's founding generation, including the indispensable insights of Thomas Jefferson, author of the Declaration of Independence and statesman of America's

> > > Professor Belz invited questions to Dr. Yarbrough from those in attendance. A reception followed

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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 2004, the Foundation's programs operated with the support of grants, contributions and endowment support received for the fellowships and the Summer Institute on the Constitution from the following:

The Atlantic Foundation

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 Salvatore Foundation
William & Jane Schloss Family Foundation
Anonymous Foundation, New Mexico



James Madison Education Fund, Inc.

The James Madison Education Fund, Inc. is an independent notfor-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, 2004, the Fund had assets of \$6,667,346.

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James Madison Memorial Fellowship Foundation FY2004 (September 30, 2004)

Balance Sheet

Assets		<u>Liabilities</u>	
Undisbursed Balance		Current Liabilities	
U.S. Treasury Account	\$1,311,063	Accounts Payable	<u>\$30,063</u>
		Total Current Liabilities	\$30,063
Accounts Receivable			
Imprest Fund	\$800	Equity	
Receivables	12,814	Beginning Balance	\$38,118,917
Interest on Investments	<u>298,042</u>	Net Change (loss)	200,718
Total Current Assets	\$1,622,719	Total Equity	\$38,319,636
Fixed Assets			
Long-term Investments (Treasuries)	\$36,716,166		
Total Net Fixed Assets	\$36,716,166		
Total Assets (See note 1)	\$38,349,699	Total Liabilities & Equity	\$38,349,699

Income and Expense Statement

Income:		Expenses:	
Interest on Investments Total Income	<u>\$2,194,917</u> <u>\$2,194.917</u>	Fellowship Expenses Operating Expenses (rent, salaries, etc.) Fund Raising Expenses Total Expenses	\$1,233,368 759,087 <u>1,746</u> \$2,182,652
		Net Income (loss)	\$200,717

Note 1: An independent not-for-profit organization, the James Madison Education Fund, Inc. provides additional financial support for the programs of the Foundation. The total assets of this Fund on September 30, 2004 were \$6,667,346.97.

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.



Edward M. Kennedy Chairman U. S. Senator, MA



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



Eric Ivan Cantor U.S. House of Representatives, VA



J.Harvie Wilkinson III Judge, U.S.Court of Appeals, 4th Circuit Charlottesville, VA



David Wesley Fleming Latham & Watkins Universal City, CA



Robert Cortez Scott U.S. House of Representatives, VA



Diarmuid F. O'Scannlain Judge, U.S. Court of Appeals, 9th Circuit



Jay Phillip Greene Manhattan Institute for Policy Research New York, NY



Rod Paige Secretary of Education Ex Officio



Drew R. McCoy Clark University Worcester, MA



John Richard Petrocik University of Missouri-Columbia Columbia, MO



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



Annual Board of Trustees' Meeting

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James Madison Fellows





Jennifer Nicholas of Utah, the 2004 Congressional Fellow

Ivy Farguheson of New Mexico



John Roach of Mississippi at the U.S. Supreme Court



Fellows tour of Thomas Jefferson's Monticello



Fellows at the James Madison Symposium



Lecture at Montpelier



Foundation Staff

Paul A. Yost, Jr. 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

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