



Formal Garden at James Madison's Montpelier.

James Madison Memorial Fellowship Foundation

2008 Annual Report

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President's Letter

Since the selection of the first class of James Madison Fellows in 1992, the Foundation has awarded fellowships to more than 1,000 secondary school teachers who are serving as constitutional scholars in classrooms throughout the fifty states of the Union. As a direct result of the Madison Fellowship program more than 50,000 students have gained deeper knowledge and understanding of the history and principles of the U.S. Constitution. This is indicative of the successful accomplishment of the Madison Foundation's fundamental mission, eloquently expressed in James Madison's observation that "the cause of free Government" depends on "Liberty & Learning, each leaning on the other for their mutual & surest support."

The Presidential election of 2008 and the current financial crisis will result in major changes in the way government business is done. The changes caused by financial and economic distress, including government partnership in major financial institutions and corporations, are likely to be far more significant than those resulting from the election. Politically speaking, the American Government is like a massive super tanker in that it is hard to stop or turn it quickly. The new president, Barack Obama, seems aware of this reality and is placing experienced Washington hands in his cabinet and in other top positions so that programmatic policy changes will be made safely and effectively.

Now more than ever we need educated and informed citizens. I am confident that our Madison Fellows, and the thousands of students whom they have taught, will continue to make a significant contribution to the common good by bringing about greater awareness of the ends, purposes, and aspirations of our great nation. James Madison Fellows hold important positions of responsibility in public and private education throughout the country, including school districts, state education departments, and national social studies organizations. I believe James Madison would be encouraged by our efforts, and pleased at the prospect of continued "advancement and diffusion of knowledge" of American political institutions.

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

President

Education Programs



James Madison Fellows at James Madison's Montpelier

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:

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.

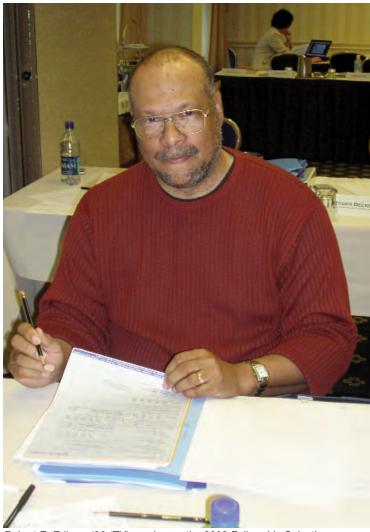
Senior Fellowships are awarded to experienced secondary school teachers for part-time graduate study toward a master's degree during summer session or in evening and weekend programs. Financial support for Senior

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.

2008 Fellowship Program



Robert E. Edison, '96 (TX) serving on the 2008 Fellowship Selection Committee.

2008 James Madison Fellows

The Foundation conducted its sixteenth nationwide competition for fellowships during 2008. From eligible applicants, 58 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 2008 Fellowship Selection Committee; they independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships:

2008 Selection Committee Members

Mr. Christopher Burket

Associate Director MAHG Program Ashland University; Ashland, OH

Dr. Joan E. Cashin

Professor Ohio State University; Columbus, OH

Ms. Shannon E. Duffy

Senior Lecturer Texas State university; San Marcos, TX

Mr. Robert E. Edison

'96 James Madison Fellow Teacher, Skyline High School; Dallas, TX

Dr. Joseph Fornieri

Associate Professor of Political Science Rochester Institute of Technology; Fairport, NY

Mr. Shawn Healy

'01 James Madison Fellow Resident Scholar McCormick Freedom Museum; Chicago, IL

Ms. JoAnna Reynolds

'03 James Madison Fellow Keyser, WV

Ms. Kathryn (Katie) Robison

'00 James Madison Fellow Falls Church, VA

Mr. David M. Seiter

'92 James Madison Fellow Educator, Northridge High School; Clearfield, UT

Dr. Silvana R. Siddali

Associate Professor St. Louis University; St. Louis MO

2008 Fellowship Awardees

WY

Sharolyn S. Griffith

Current Teachers (Senior Fellows)					
Listed by state of legal residence, name, and secondary school where they teach.					
AK	Timothy C. Christopherson	East Anchorage High School, Anchorage, AK			
AR	Amber D. Hodges	Russellville High School, Russellville, AR			
AZ	Tiffany D. Frane	Basha High School, Chandler, AZ			
CA	Catherine M. Alderman	Anderson New Technology High School, Anderson, CA			
CA	Susan M. Piekarski	Irvington High School, Fremont, CA			
CA	Jeffrey M Sprague	Holy Names High School, Oakland, CA			
CT	Sarah A. Lawrence	Hall High School, West Hartford, CT			
DE	William J. McGowan, III	Salesianum School, Wilmington, DE			
FL	Mary Z. Angelo	Falcon Cove Middle School, Weston, FL			
GA	Zubulun D. Thomas	Mount Paran Christian School, Kennesaw, GA			
IA	Melanie A. Clark	West Liberty High School, West Liberty, IA			
ID	Theresa H. Silvester	Buhl Middle School, Buhl, ID			
IL	Erica Bray-Parker	Glenbard North High School, Carol Stream, IL			
IL	Robert S. Taylor	John F. Kennedy Catholic High School, Manchester, MO			
IN	Michael G. Gordon	Munster High School, Munster, IN			
KS	Michael L. Wilmoth	Wellington Senior High School, Wellington, KS			
KY	Vanessa R. Lierley	East Oldham Middle School, Crestwood, KY			
LA	Emmitt Glynn, III	Episcopal High School, Baton Rouge, LA			
MA	Matthew F. Oosting	North Reading High School, North Reading, MA			
MD	Shawn F. Dougherty	Bishop McNamara High School, Forestville, MD			
MD	Brandy A. Reazer	McKenney Hills Center Alternative Programs, Silver Spring, MD			
MI	Brevet L. Bartels	West Ottawa High School-North Campus, Holland, MI			
MN	Shane A. Baker	Century High School, Rochester, MN			
MS	David J. Pinnow	Lewisburg Middle/High School, Olive Branch, MS			
ND	Elliot G. Rotvold	Hillsboro High School, Hillsboro, ND			
NE	Cory J. Vasek	Mary Our Queen School, Omaha, NE			
NH	Ryan N. Richman	Timberlane Regional High School, Plaistow, NH			
NJ	Brian F. Boyce	Manalapan High School, Englishtown, NJ			
NJ	Marc A. Lifland	South Brunswick High School, Monmouth Junction, NJ			
NM	Karen D. Cox	Atrisco Heritage Academy High School, Albuquerque, NM			
NM	Curtis P. Crane	Mountain View Middle School, Alamogordo, NM			
NV	Sarah L. Bothun	Spanish Springs High School, Sparks, NV			
ОН	Kimberly J. Huffman	Wayne County Joint Vocational School District, Smithville, OH			
OH	Eric A. Wierwille	Hilliard City Schools, Hilliard, OH			
OK	Angela A. Dormiani	Oklahoma City Public School District, Oklahoma City, OK			
OK	Stephanie D. Lowry	Durant Senior High School, Durant, OK			
OR	Marc J. Brewer	Clatskanie High School, Clatskanie, OR			
PA	Maria R. Savini	Upper Merion Area High School, King of Prussia, PA			
RI	Maureen E. McGuirl	Jamestown Public Middle School, Jamestown, RI			
SC	Ray F. Hawkins	Woodland High School, Dorchester, SC			
SD	Suzanne E. Moum-Nelson	Stevens High School, Rapid City, SD			
TN	James H. Thames Jr.	Central High School, Memphis, TN			
TX	Cari L. Gray	New Braunfels Senior High School, New Braunfels, TX			
TX	Sarah A. Kasparian	Lakeview Centennial High School, Garland, TX			
UT	Robert J. Stoddard				
VA		Mountain View High School, Orem, UT			
	Kenneth A. Mason	Central High School, Woodstock, VA			
VT	Jennifer M. Kelly	Gunston Middle School, Arlington, VA			
WA	Monty R. Johnson	Sunnyside Senior High School, Sunnyside, WA			

Swift Creek Learning Center, Afton, WY

2008 Fellowship Awardees, cont.

Prospective Teachers (Junior Fellows)

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

AL	Sabrina D. Dyck	University of Montevallo, Montevallo, AL
CA	Faith Reynado	University of California, Santa Barbara, Santa Barbara, CA
CO	Elisha N. Roberts	Occidental College-Los Angeles, Los Angeles, CA
FL	Hannah D. Markwardt	University of South Carolina-Columbia, Columbia, SC
ME	Molly B. Feeney	University of Maine, Orono, ME
MO	Sarah A. Hoff	William Jewell College, Liberty, MO
NC	Jennifer M. Biser	University of North Carolina-Chapel Hill, Chapel Hill, NC
NY	Nicole Brooks-Donolli	Marist College, Poughkeepsie, NY
WI	Patrick G. Morgan	Vassar College-Poughkeepsie, Poughkeepsie, NY

Ms. Alderman's fellowship, the Henry Salvatori-James Madison Fellowship, is endowed by the Henry Salvatori Foundation.

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

Ms. Bray-Parker's fellowship, the McCormick Freedom Museum-James Madison Fellowship, is funded by the McCormick Freedom Museum of Chicago, Illinois.

Ms. Reazer's fellowship, the J. Willard and Alice S. Marriott-James Madison Fellowship, is funded by the J. Willard and Alice S. Marriott Foundation of Washington, D.C.

Mr. Lifland'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. Cox's fellowship, The Hatton W. Sumners-Iames Madison Fellowship, is funded by The Hatton W. Sumners Foundation of Dallas, Texas.

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

Ms. Dormiani's fellowship, The Hatton W. Sumners-James Madison Fellowship, is funded by The Hatton W. Sumners Foundation of Dallas, Texas.

Ms. Kasparian's fellowship, The Hatton W. Sumners-James Madison Fellowship, is funded by The Hatton W. Sumners Foundation of Dallas, Texas.

Ms. Reynado's fellowship, the Henry Salvatori-James Madison Fellowship, is endowed by the Henry Salvatori Foundation.

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

Summer Institute on the Constitution



Fellows on a walking tour of Arlington National Cemetery.

The 2008 Summer Institute on the Constitution was held from June 21, 2008 to July 18, 2008. A total of 56 James Madison Fellows, representing nearly every state, attended the Institute. The Foundation invited two individuals to join the Institute, a Cuban Fellow and an Iraqi Fellow.

The Institute took place on the campus of Georgetown University and was the sixteenth 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 Anti-federalist

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 discussions 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. 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 2008 Institute com-

James Madison



Emily F. Bagley, '07 (NC) taking notes during Summer Institute lecture.



Professor Susan E. Hanssen lecturing at the 2008 Summer Institute on the Constitution.

pleted 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 Director and Professor of History, emerits, at the University of Maryland; Dr. Jeffry H. Morrison, Assistant Professor of Government, Regent University; Dr. Kevin R. Hardwick, Assistant Professor of History, James Madison University; and Dr. Susan E. Hanssen, Assistant Professor of History, University of Dallas. For the Institute, they hold appointments as Adjunct Professors of History at Georgetown University.

The Fellows were academically focused and worked hard during the 2008 Institute. The academic program continues to be rigorous and challenging for the participants. Many collegial friendships were made among the Fellows.

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. This directory helps Fellows stay in touch with each other.

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: www.jamesmadison.gov.

The Foundation's Internet site has approximately 1.4 million visitors each year.



James Madison Symposium







Michael Sharer TIME Magazine



Heritage Foundation



Steve Rendall



Victoria Clarke Comcast Corporation



NBC News



Brookings Institution



John Samples CATO Institution

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 2008 Symposium was held June 26 to June 28, 2008 on the campus of Georgetown University. The title of the Symposium was "Freedom of Speech and the Press in the Information Age." The Symposium was cosponsored with the McCormick Freedom Museum of Chicago, Illinois.

The Symposium included four sessions and a Symposium Banquet. The sessions were as follows:

Free Speech on the Internet, Blogs and the Traditional Press: Jane Hall, Associate Professor, School of Communications, American University and Michael Scherer, Correspondent, TIME Magazine.

Should the U.S. Return to the Fairness Doctrine? Speakers: Todd Gaziano, Director of Center for Legal and Judicial Studies, Heritage Foundation and Steve Rendall, Senior Analyst, Fairness and Accuracy in Reporting (FAIR).

Should Reporting Be Limited During Times of War?

Speakers: Victoria Clarke, Senior Advisor of Communications and Government Affairs, Comcast Corporation, and Pete Williams, News Correspondent, NBC News.

Free Speech and Campaign Finance Reform: Speakers: Thomas Mann, Senior Fellow, Brookings Institution, and John Samples, Director of Center for Representative Government, CATO Institution.

The guest speaker at the Symposium Banquet was Brian Lamb, CEO of C-SPAN Networks.

Through a generous grant from the McCormick Freedom Museum, 50 alumni members of the James Madison Foundation were flown into Washington, D.C. and were provided room and board for the Symposium. With the 55 Summer Institute participants already attending Georgetown and other James Madison Fellows who came at their own expense, the Symposium had approximately 150 James Madison Fellows in attendance.

A copy of the Symposium Report, including lesson plans, is located on the Foundation's Internet site.

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.

Since the Foundation's endowment covers all overhead and administrative costs, each donation to the Foundation is devoted to the funding of 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.



During FY 2008, the Foundation's programs operated with the support of grants, contributions and endowment support received for the fellowship awards 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
McCormick Freedom Museum Foundation
The Henry Salvatori Foundation
Hatton W. Sumners Foundation, Inc.
Anonymous Foundation
Numerous contributions from James Madison Fellows



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.



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, 2008, the Fund had assets of \$8,524,461.84.

James Madison Memorial Fellowship Foundation FY2008 (September 30, 2008)

Balance Sheet

A sscts		<u>Liabilities</u>	
Undisbursed Balance U.S. Treasury Account	\$2,044,171.83	Current Liabilities Accounts Payable Total Current Liabilities	\$463,777.31 \$463,777.31
Accounts Receivable Imprest Fund Receivables Interest on Investments Total Current Assets	\$0.00 \$340,174.85 \$ <u>292,646.02</u> \$2,676,992.70	Equity Beginning Balance Net Change (loss) Total Equity	\$38,726,419.15 ¹ \$301,037.72 \$39,027,456.87
Fixed Assets Long-term Investments (Treasuries) Total Net Fixed Assets	\$36,814,241.48 \$36,814,241.48		
Total Assets	<u>\$39,491,234.18</u>	Total Liabilities & Equity	\$39,491,234.18

Income and Expense Statement

Income:		Expenses:	
Interest on Investments Total Income	\$2,216,127.30 \$2,216,127.30	Fellowship Expenses Grant to Education Fund Operating Expenses (rent, salaries, etc.) Fund Raising Expenses Total Expenses	\$1,079,707.53 \$0.00 \$834,561.05 <u>\$821.00</u> \$1,915,089.58
		Net Income (loss)	\$301,037.72

Note 1: A change to the Equity Beginning Balance was made by the GSA External Services Division and was the result of audit adjustments. Both Accounts Receivable and Accounts Payable were adjusted causing the Equity to also be adjusted.

Note 2: An independent not-for-profit organization, the James Madison Education Fund, Inc. provides additional financial support for the programs of the James Madison Memorial Fellowship Foundation. The total assets of this Fund on September 30, 2008 were \$8,524,461.84.

Governance

The Foundation is governed by a Board of Trustees consisting of thirteen members. Twelve members-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 the Secretary of Education, board membership is evenly divided between political parties. The Foundation expresses thanks for the support of David Wesley Fleming whose term as Trustee is now completed.

President Bush has recently appointed (October 2008) three new Trustees to the Foundation: John J. Faso of New York, Governor Joseph Manchin of West Virginia, and Harvey M. Tettlebaum of Missouri.



Trustees speaking with the fellows during the 2008 Trustees meeting.



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



U.S. Senator, TX



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



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



Drew R. McCoy, Clark University, Worcester, MA



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



John Richard Petrocik University of Missouri-Columbia Columbia, MO



Steven M. Colloton Judge, U.S. Court of Appeals, 8th Circuit Des Moines, Iowa



Margaret Spellings Secretary of Education Ex Officio



J.C.A. Stagg, University of Virginia, Charlottesville, VA



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

James Madison Fellows



Brian Lamb, CEO of C-SPAN Networks was the James Madison Symposium Banquet speaker. He is shown with Norma Claytor, Office Manager of the Foundation.



Marion L. Anderson, '97 (IL) attending the 2008 James Madison Symposium.



Pat A. Ramsey '95 (AR) and Patricia D. Radigan '95 (FL) at the 2008 James Madison Symposium.



Jennifer M. Reiter, '07 (OK), Salman B. Hamid, '07 (CT), and Jeffrey A. Hinton, '07 (NV) laying a wreath at the tomb of George Washington at Mt. Vernon, Virginia.



Sandra J. Reed, '07 (TX) taking notes on the campus of Howard University in Washington, D.C.



Jeremy R. Yenger, '07 (IA) and Trustee, Judge Steven M. Colloton at the Foundation's annual Trustees meeting.

Foundation Staff

Paul A. Yost, Jr. President

Herman Belz Academic Director 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 Administration and Finance Director

Foundation Office

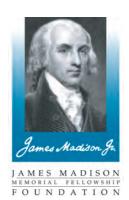
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Foundation's Internet Address:

www.jamesmadison.gov Fellowship applications are available online.



James Madison Memorial Fellowship Foundation 2000 K Street, N.W. Suite 303 Washington, D.C. 20006-1809 202-653-8700

www.jamesmadison.gov

applications available on-line