

James Madison Memorial Fellowship Foundation

2007 Annual Report



Bust of James Madison located at James Madison's Montpelier; Orange, Virginia.

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President's Letter



Our first class of James Madison Fellows was the Class of 1992 and in the ensuing fifteen years we awarded fellowships to over 1,000 secondary school teachers. More than 900 Madison Fellows have served or are serving in high school classrooms as constitutional scholars. Still more impressive is the fact that in excess of 50,000 students have gained a deeper knowledge of American history and the Constitution under their tutelage. This is indicative of successful accomplishment of the mission of the Madison Foundation, expressed in James Madison's observation that liberty and learning are partners in this great republic.

We will soon be approaching the year of a momentous presidential election. The issues are stark for the American people and for the world. The Iraq War, immigration, terrorism and free trade are issues that go far beyond our national boundaries. A learned and well informed electorate was never more important. I believe that our Madison Fellows and the thousands of students whom they have taught will make a significant contribution to the health of the body politic by bringing a greater awareness of the issues and aspirations of our great nation.

To the 50,000 students who have benefited from the efforts of Madison Fellows we will add another group of similar size each decade. James Madison Fellows now hold important positions in education in every state of the Union, including school districts, social studies departments, state educational bodies and national social studies organizations. I think that James Madison, our namesake, would be pleased with our efforts and even more pleased with our potential to expand this work.

Sincerely,

A handwritten signature in blue ink that reads "Paul A. Yost, Jr." with a stylized flourish at the end.

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:

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 maxi-



James Madison Fellows at Thomas Jefferson's Monticello.

imum 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 com-

parison 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.

2007 Fellowship Program



2007 Fellowship Selection Committee reading applications.

2007 James Madison Fellows

The Foundation conducted its fifteenth nationwide competition for fellowships during 2007. From eligible applicants, 50 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 2007 Fellow Selection Committee; they independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships:

2007 Selection Committee

Mr. Roger L. Beckett

Deputy Director Ashbrook Center for Public Affairs
Ashland University
Ashland, OH

Dr. Joseph Fornieri

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

Mr. David M. Seiter

'92 James Madison Fellow
Educator, Northridge High School
Clearfield, Utah

Dr. Steven C. Bullock

Professor of History
Worcester Polytechnic Institute
Worcester, MA

Mr. Shawn Healy

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

Ms. Shannon E. Duffy

Lecturer, Loyola University-New Orleans
Austin, TX

Ms. Kathryn (Katie) Robison

'00 James Madison Fellow
Former History Teacher, Fairfax County Public Schools
Las Vegas, NV

Mr. Robert E. Edison

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

Ms. Jeanne T. Salvado

'96 James Madison Fellow
Content Specialist K-12
Montgomery County Schools
Silver Spring, MD

2007 Fellowship Awardees

Current Teachers (Senior Fellows)

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

Arizona	Nichole D. Evans	Mesquite Junior High School; Gilbert, AZ
Arkansas	Elizabeth H. Foshee	Jacksonville High School - PCSSD; Jacksonville, AR
California	Donald F. De Angelo	Cathedral Catholic High School; San Diego, CA
California	Heidi Stepp	Amado Valley High School; Pleasanton, CA
Colorado	Brian L. Bohnert	Ralston Valley High School; Arvada, CO
Delaware	Christopher P. Jones	Middletown High School; Middletown, DE
District of Columbia	Amy Trenkle	Stuart-Hobson Middle School; Washington, DC
Florida	Joseph L. Cofield	Bonita Springs Middle School; Bonita Springs, FL
Georgia	Emily Juckett	Walton High School; Marietta, GA
Hawaii	David E. Hughes	Maui High School; Kahului, HI
Idaho	Holly Kartchner	Blackfoot High School; Blackfoot, ID
Illinois	John M. Tobias	Athens High School CUSD 213; Athens, IL
Illinois	Pat Usher	Carl Sandburg High School; Orland Park, IL
Indiana	Elizabeth A. Bailey	Hamilton Southeastern High School; Fishers, IN
Iowa	Jeremy R. Yenger	Johnston High School; Johnston, IA
Kentucky	Suzanne L. Moss	Floyd Central High School; Floyds Knobs, IN
Louisiana	Robyn Verbois	Christian Life Academy; Baton Rouge, LA
Maryland	Christopher J. Forney	John T. Baker Middle School; Damascus, MD
Maryland	Sarah H. Poole	Arundel High School; Gambrills, MD
Massachusetts	Rebecca L. Johnson	Malden High School; Malden, MA
Michigan	Matt Schmidt	Bay City Central High School; Bay City, MI
Minnesota	Denise North	Wrenshall High School; Wrenshall, MN
Mississippi	Robert M. Walters	Lanier High School; Jackson, MS
Missouri	John Deken	Hickman High School; Columbia, MO
Montana	Christina Cote	Gardiner Public School; Gardiner, MT
Nebraska	Jennifer S. Kennedy-Smith	Douglas County West Community Schools; Valley, NE
Nevada	Jeffrey Hinton	Sierra Vista High School; Las Vegas, NV
New Jersey	David Reader	Camden Catholic High School; Cherry Hill, NJ
New Mexico	Rachael Button-Koenigsfeld	James Monroe Middle School; Albuquerque, NM
New Mexico	Joel D. Fouser	Del Norte High School; Albuquerque, NM
New York	Matthew E. Turner	Burnt Hills-Ballston Lake High School; Burnt Hills, NY
Ohio	Robert N. Curtis	Westlake High School; Westlake, OH
Oklahoma	Jennifer M. Reiter	Carver Middle School; Tulsa, OK
Oregon	Erin M. Nooy	McMinnville High School; McMinnville, OR
Pennsylvania	Matthew G. Roy	Sun Valley High School; Aston, PA
Rhode Island	Valerie M. Frezza	North Smithfield Jr-Sr High School; North Smithfield, RI
South Carolina	Anne Kelsey	Hilton Head Middle School; Hilton Head Island, SC
Tennessee	Deborah K. Puckett	Madison Academic Magnet High School; Jackson, TN
Texas	Rebecca L. Lacquey	Katy High School; Katy, TX
Texas	Sandra J. Reed	Faith West Academy; Katy, TX
Utah	Jeniece Jacobson	Riverton High School; Riverton, UT
Vermont	Catherine M. Reen	Milton Elementary School; Milton, VT
Virginia	Jennifer A. Bain	Thomas Jefferson High School for Science and Technology; Alexandria, VA
Washington	Leah D. MacKenzie	Three Rivers Christian School; Kelso, WA
Wisconsin	Jennifer L. Melville	Kaukauna High School; Kaukauna, WI
Wisconsin	Blanca S. Ramirez	Warren Township High School; Gurnee, IL
Wyoming	Meaghan C. Gibson	Laramie Senior High School; Laramie, WY

2007 Fellowship Awardees, cont.

Prospective Teachers (Junior Fellows)

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

Alabama	Randall Reed	Troy University; Troy, AL
California	Theodora E. Chang	Stanford University; Stanford, CA
Connecticut	Salman B. Hamid	Albertus Magnus College; New Haven, CT
Florida	Kelly L. Smith	The Florida State University; Tallahassee, FL
Kansas	Janeal D. Schmidt	Kansas State University; Manhattan, KS
New Hampshire	Colby R. Young	University of New Hampshire; Durham, NH
New Jersey	Maya Afek	Rutgers University-New Brunswick; New Brunswick, NJ
North Carolina	Emily F. Bagley	University of North Carolina - Chapel Hill; Chapel Hill, NC
South Dakota	Heather L. Hubbel	University of Sioux Falls; Sioux Falls, SD
West Virginia	William C. Schaffer Jr.	University of Charleston; Charleston, WV

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

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

Mr. Usher's fellowship, the McCormick Tribune Freedom Museum-James Madison Fellowship is funded by the McCormick Tribune Freedom Museum of Chicago, Illinois.

Ms. Poole'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. Reader'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. Button-Koenigsfeld's fellowship, The Hatton W. Sumners-James Madison Fellowship is funded by the Hatton W. Sumners Foundation of Dallas, Texas.

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

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

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

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



Glass window at the new Mt. Vernon Visitor's Center. Mt. Vernon hosts the James Madison Fellows each summer for a day of exploration and lecture.

Summer Institute on the Constitution



Fellows at the Library of Congress.



Fellows on a walking tour of Arlington National Cemetery.

The 2007 Summer Institute on the Constitution was held from June 23, 2007 to July 20, 2007. A total of 52 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 fifteenth 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 2007 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 Director 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.

The Fellows were academically focused and worked hard during the 2007 Institute. The academic program continues to be rigorous and challenging for the participants. Many collegial friendships were made among the Fellows.



James Madison Fellows receiving a presentation at Monticello.



Fellows having a picnic dinner at 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: www.jamesmadison.gov.

The Foundation’s Internet site has approximately 1.4 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 2007 Symposium was held on July 6, 2007 in the Hart Senate Office Building. The topic of the Symposium was "The Global Voyage of American Constitutionalism: The Influence of the American Constitutional Experience in Other Lands," by Professor A.E. Dick Howard from the University of Virginia School of Law.

Widely acknowledged as an expert in the fields of constitutional law, comparative constitutionalism, and the Supreme Court, A. E. Dick Howard is the White Burkett Miller Professor of Law and Public Affairs at the University of Virginia. Born and raised in Richmond, Virginia, Professor Howard is a graduate of the University of Richmond and received his law degree from the University of Virginia. He was a Rhodes Scholar at Oxford University, where he read philosophy, politics, and economics. After graduating from law school, he was a law clerk to Justice Hugo L. Black of the Supreme Court of the United States.

Active in public affairs, Professor Howard was executive direc-

tor of the commission that wrote Virginia's current constitution and directed the successful referendum campaign for its ratification. He has been counsel to the General Assembly of Virginia and a consultant to state and federal bodies, including the U.S. Senate Judiciary Committee. From 1982 to 1986 he served as counselor to the Governor of Virginia, and he chaired Virginia's Commission on the Bicentennial of the United States Constitution.



Professor A.E. Dick Howard

Often consulted by constitutional draftsmen in other states and abroad, Professor Howard has compared notes with revisers at work on new constitutions in Brazil, Hong Kong, the Philippines, Hungary, Czechoslovakia, Poland, Romania, Russia, Albania, Malawi, and South Africa. In 1996, the Union of Czech Lawyers, citing Professor Howard's promotion of the idea of a civil society in Central Europe, awarded him their Randa Medal-the first time this honor has been conferred upon anyone but a Czech citizen.

Professor Howard provided the Fellows with a thought provoking discussion of how the U.S. Constitution has greatly influenced numerous other constitutions throughout the world. Professor Howard is a former trustee of the Madison Foundation.

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.

Donations and Contributions

During FY 2007, 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
McCormick Tribune Freedom Museum Foundation
The Henry Salvatori Foundation
Hatton W. Sumners Foundation, Inc.
Anonymous Foundation



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 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, 2007, the Fund had assets of \$9,920,600.89.

James Madison Memorial Fellowship Foundation FY2007 (September 30, 2007)

Balance Sheet

<u>Assets</u>		<u>Liabilities</u>	
Undisbursed Balance		Current Liabilities	
U.S. Treasury Account	\$1,891,972.74	Accounts Payable	<u>\$642,795.57</u>
		Total Current Liabilities	\$642,795.57
Accounts Receivable		Equity	
Imprest Fund	\$0.00	Beginning Balance	\$38,376,564.86 ¹
Receivables	\$199,734.05	Net Change (loss)	<u>\$160,626.56</u>
Interest on Investments	\$297,049.14	Total Equity	\$38,537,191.42
Total Current Assets	\$2,388,755.93		
Fixed Assets			
Long-term Investments (Treasuries)	\$36,791,231.06		
Total Net Fixed Assets	\$36,791,231.06		
Total Assets	<u>\$39,179,986.99</u>	Total Liabilities & Equity	<u>\$39,179,986.99</u>

Income and Expense Statement

Income:		Expenses:	
Interest on Investments	<u>\$2,236,181.65</u>	Fellowship Expenses	\$1,287,636.22
Total Income	<u>\$2,236,181.65</u>	Grant to Education Fund	\$0.00
		Operating Expenses (rent, salaries, etc.)	\$787,217.87
		Fund Raising Expenses	<u>\$701.00</u>
		Total Expenses	\$2,075,555.09
		Net Income (loss)	<u>\$160,626.56</u>

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, 2007 were \$9,920,600.89.

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 the Secretary of Education, board membership is evenly divided between political parties.



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



*John Cornyn,
U.S. Senator, TX*



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



*David Wesley Fleming,
Latham & Watkins,
Universal City, CA*



*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*



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



*Margaret Spellings
Secretary of
Education
Ex Officio*



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

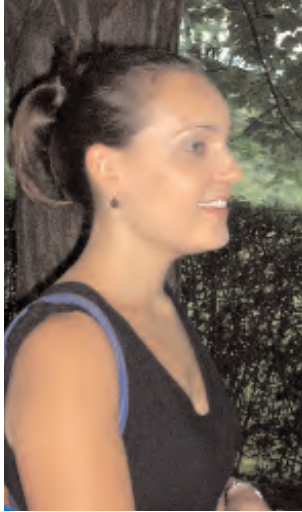


*Steven M. Colloton
Judge, U.S. Court of
Appeals, 8th Circuit
Des Moines, Iowa*



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

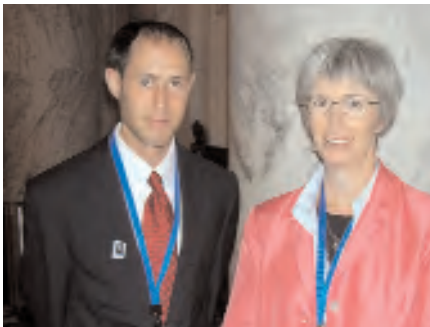
James Madison Fellows



Elizabeth D. Angney, '06 (VA).



James Madison Fellows on the campus of Howard University in Washington, D.C.



2007 Congressional Fellows: Noah M. Lawrence '04 (IA); Eileen Sheehy, '92 (MT).



Senator Edward M. Kennedy swearing in new board member, Judge Steven M. Colloton, who was appointed to a six year term by President Bush.



Walker Asserson, '06 (MT), at the National Archives teacher's workshop.



Angelia S. Moore, '06 (MO), having lunch at Michie Tavern located next to Thomas Jefferson's Monticello.



Professor Belz following Fellows into James Madison home, Montpelier.

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

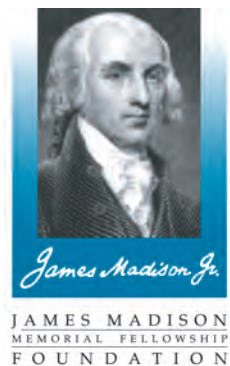
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Foundation's Internet Address:

www.jamesmadison.gov
Fellowship applications are
available online.



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202-653-8700

www.jamesmadison.gov

applications available on-line