

# JAMES MADISON MEMORIAL FELLOWSHIP FOUNDATION

2009 ANNUAL  
REPORT

*EDWARD M. KENNEDY*  
*FOUNDATION CHAIRMAN*  
*1992 - 2009*



*2009 Board of Trustees Meeting held in the Dirksen Senate Office Building, July 7, 2009.*

# James Madison Memorial Fellowship Foundation

2009 Annual Report

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# A Tribute to Senator Edward M. Kennedy Founding Chairman of the Foundation

Senator Edward M. Kennedy served as the Foundation's founding Chairman. He was appointed to the Board of Trustees on October 4, 1988 by President Ronald Reagan. Senator Kennedy served continuous terms on the Foundation's board until his death on August 25, 2009. The following photos were taken over the 21 years of service Senator Kennedy gave to the Foundation.



## President's Letter



In the lead up to the 1987 Bi-Centennial Celebration of the U. S. Constitution the President of the United States appointed an illustrious commission to plan and execute the commemoration. Not surprisingly Senator Ted Kennedy was one of the movers and shakers leading that Commission. The Senator chaired the Education Committee of the Commission and from him and his committee came the genesis of the idea for the Foundation. The James Madison Memorial Fellowship Foundation is a lasting tribute to the Constitution as well as a living legacy to Senator Kennedy himself. Senator Kennedy served for over 21 years as the Chairman of the Board of the Foundation and was deeply involved in its growth and success. He loved the Constitution and often related to the Madison Fellows his own infatuation with the Constitution. His love grew in school while studying under a Harvard professor who had imbued his brothers Jack and Bobby with this same awe and respect for this great founding document.

From the initial idea for an educational organization that would celebrate the Constitution in perpetuity, the Madison Foundation, with private support, has grown to the point where it has a fifty million dollar endowment. More than 1000 Constitutional scholars have been placed in secondary school classrooms in every state of the nation, most of the territories and even in such foreign countries as Iraq and Cuba. James Madison scholars hold critical positions in federal, state and local education serving as school district administrators, school principals, social studies department heads and, perhaps most important, as social studies and history classroom teachers. I might also mention that one of our Fellows has served on the President's staff and another as a history professor at West Point.

From the staff of the Foundation and every James Madison Fellow, thank you Senator Ted Kennedy for this gift to the people of the United States and for the difference it is making in high school classrooms throughout this country.

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 Fellows at the U.S. Supreme Court, where Chief Justice John Roberts spoke to the group.*

### 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.

## 2009 Fellowship Program



2009 Fellowship Selection Committee members, Carol B. Conrad and William Gillespie.

### 2009 James Madison Fellows

The Foundation conducted its eighteenth nationwide competition for fellowships during 2009. From eligible applicants, 55 individuals were selected as James Madison Fellows. Funding from private donors allowed the Foundation to award additional fellowships in several states.

Listed are the individuals who served as members of the 2009 Fellowship Selection Committee; they independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships:

### 2009 Selection Committee Members

**Dr. David Buckner**

'99 James Madison Fellow  
Assistant Professor  
Oklahoma State University  
Stillwater, OK

**Mr. Christopher Burket**

Associate Director MAHG Program  
Ashland University; Ashland, OH

**Ms. Carol B. Conrad**

'95 James Madison Fellow  
Dean of Faculty  
Bullis School  
Potomac, MD

**Mr. Kenneth deMasi**

'98 James Madison Fellow  
Social Studies Department Chair  
Riverview High School  
Chandler, AZ

**Dr. William Gillespie**

'95 James Madison Fellow  
Professor  
University of Phoenix  
Provo, Utah

**Mr. Michael Hunt**

'97 James Madison Fellow  
Academy Programs Coordinator  
Wheaton High School  
Silver Spring, MD

**Ms. Melisa Larson**

'98 James Madison Fellow  
Social Studies Teacher  
West Albemarle High School  
Charlottesville, VA

**Dr. Larry R. Peterson**

Professor of History  
North Dakota State University  
Fargo, ND

**Ms. Patsy Ramsey**

'95 James Madison Fellow  
Instructor, Department of History  
University of Central Arkansas

## 2009 Fellowship Awardees

### Current Teachers (Senior Fellows)

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

AK	Roxann L. Gagner	Sitka High School; Sitka, AK
AL	Deborah L. Weidner-Stover	Central High School Coosa County; Rockford, AL
AZ	Daniel W. Jordan	Glendale High School; Glendale, AZ
CA	Richard J. Guiremand	Santa Maria High School; Santa Maria, CA
CA	James D. Maddox	Highland High School; Bakersfield, CA
CO	Kurt R. Knierim	Rocky Mountain High School; Fort Collins, CO
CT	David A. Wilock	Wilton High School; Wilton, CT
FL	Debra A. Pettingill	Largo Senior High School; Largo, FL
FL	Jaime M. Soberon	Amos P. Godby High School; Tallahassee, FL
IA	Benjamin N. Knight	Johnston High School; Johnston, IA
ID	Lewis R. Dean Jr.	Middleton High School; Middleton, ID
IL	Zachary Crandall	Buffalo Grove High School; Buffalo Grove, IL
IL	John J. Mahon	Jordan Community School; Chicago, IL
KS	Laura A. Koenig	Indian Woods Middle School; Overland Park, KS
KY	Shawn P. Moore	Russell High School; Russell, KY
LA	Stefan L. Lallinger	Langston Hughes Charter Academy; New Orleans, LA
LA	Christopher P. Totaro	West Jefferson High School; Harvey, LA
MA	Gracieta S. Small	Lincoln High School; Lincoln, MA
MD	Brenda M. Diaz	Lowell School; Washington, DC
ME	Kip O. Plaisted	Penabscot Valley High School; Howland, ME
MI	Kelly J. Eddy	Winston Churchill High School; Livonia, MI
MI	Bob Wood	Oakridge High School; Muskegon, MI
MN	Robb P. Virgin	South Middle School; Eau Claire, WI
MO	David W. Mayne	Cameron R-I High School; Cameron, MO
MT	Joanne M. Anibaldi-Berry	Moore High School; Moore, MT
NC	Evan Clapsaddle	Swain County High School; Bryson City, NC
NE	Timothy D. Royers	Millard West High School; Omaha, NE
NH	Michael E. Hennessy	Manchester High School Central; Manchester, NH
NJ	Andrew D. Assini	JP Case Middle School; Flemington, NJ
NJ	Craig E. Uplinger	Marlboro High School; Marlboro, NJ
NM	Tina M. Lucas	Alamogordo High School; Alamogordo, NM
NV	Shyle J. Irigoien	Edward Pine Middle School; Reno, NV
OH	Christopher J. Beavers	Logan Elm High School; Circleville, OH
OH	Amanda L. Waluzak	Arts and College Prep Academy; Columbus, OH
OK	Margaret M. DeWeese	Thoreau Demonstration Academy; Tulsa, OK
OR	Carissa J. Harris	David Douglas High School; Portland, OR
PA	Brendon J. Jobs	Philadelphia High School for Girls; Philadelphia, PA
PA	Jeff Manassero	Discovery Charter School; Philadelphia, PA
TN	Allan G. Aubrey	Sullivan East High School; Bluff City, TN
TX	Kristie L. Barbee	S.P. Waltrip Senior High School; Houston, TX
TX	Jennifer Hoefler	Pearland High School; Pearland, TX
TX	Marci L. Ward	Richland Senior High School; North Richland Hills, TX
UT	Todd H. Landeen	Jordan High School; Sandy, UT
VA	Mary O. Cosby	Pocahontas Middle School; Richmond, VA
VT	Stephen J. Johnson	Rivendell Academy; Orford, NH
WA	Sharon K. Conditt	Woodland High School; Woodland, WA



## 2009 Fellowship Awardees, cont.

WI	Charles P. Slusser	Oregon High School; Oregon, WI
WY	Nicholas B. Moyte	Worland High School; Worland, WY

### Prospective Teachers (Junior Fellows)

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

AR	Alexander L. McKnight	University of Arkansas; Fayetteville, AR
IN	Brittany J. Moser	Ball State University; West Muncie, IN
MS	Terry R. Johnston	University of Southern Mississippi; Hattiesburg, MS
NY	Robert S. Vincent	University of Maryland, College Park; College Park, MD
SC	Paige Fennell	University of South Carolina, Columbia; Columbia, SC
SD	Brittany Neiles	University of South Dakota; Vermillion, SD
MD	Alison Warner	York College of Pennsylvania, York, PA

*Mr. Maddox's fellowship, the Henry Salvatori-James Madison Fellowship, is endowed by the Henry Salvatori Foundation.*

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

*Mr. Mabon's fellowship, the McCormick Foundation-James Madison Fellowship, is funded by the McCormick Foundation of Chicago, Illinois.*

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

*Mr. Uplinger's fellowship, the Fairleigh S. Dickinson, Jr.-James Madison Fellowship, is endowed by the Fairleigh S. Dickinson, Jr. Foundation, Inc., of Delray Beach, Florida.*

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

*Ms. Waluzak's fellowship, The Fred A. Lennon-James Madison Fellowship, is funded in part by the Fred A. Lennon Charitable Trust of Beechwood, Ohio.*

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

*Mr. Jobs' fellowship, The Rhode Island Foundation-James Madison Fellowship, is funded by the Rhode Island Foundation of Providence, Rhode Island.*

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

*Ms. Warner'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.*



## Summer Institute on the Constitution



*Fellows on a 2009 walking tour of Arlington National Cemetery.*

The 2009 Summer Institute on the Constitution was held from June 20, 2009 to July 17, 2009. A total of 56 James Madison Fellows, representing nearly every state, attended the Institute. The Foundation invited three individuals to join the Institute, two Cuban Fellows 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. Fellows also toured the White House this year.

The Fellow's academic progress was evaluated through three written papers/examinations. Fellows were also evaluated on class participation.

The Foundation staff handled all administrative aspects of the





Faculty of the 2009 Summer Institute on the Constitution: Daniel L. Driesbach, Marion C. Nelson, Jeffrey H. Morrison, Herman Belz.



Sharolyn S. Griffith, '08 (WY), Michael L. Wilmoth, '08 (KS) and Cory J. Vasek, '08 (KS) at Monticello.

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, emeritus, at the University of Maryland; Dr. Jeffrey H. Morrison, Assistant Professor of Government, Regent University; Dr. Daniel L. Driesbach, Professor of Justice, Law and Society, the American University, and Dr. Marion C. Nelson, independent scholar. For the Institute, they hold appointments as Adjunct Professors of History at Georgetown University.

The Fellows were academically focused and worked hard during the 2009 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. The Foundation also has a Facebook page. The directory and the Facebook page help 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](http://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 2009 Symposium was held July 10, 2009, in room 902 of the Hart Senate Office Building in Washington, D.C. The title of the Symposium was “**Was James Madison Really the Founding Father of the CIA?**”, a lecture given by Professor John C. A. Stagg, of the University of Virginia, and Editor-in-chief of *The Papers of James Madison* at the University of Virginia. Professor Stagg is also a Trustee of the James Madison Memorial Fellowship Foundation.

Professor Stagg’s lecture was based on his recently published book, “*Borderlines in Borderlands, James Madison and the Spanish-American Frontier, 1776-1821.*” Professor Stagg outlined an interesting web of circumstances where some assumed that James Madison sent spies and agents into the Spanish borderlands between 1810 to 1813. He argues that President Madison’s real intent was to find a peaceful and legal resolution to the disputes over the boundaries of Louisiana. Following the lecture, James Madison Fellows were able to pose questions to Professor Stagg. A small reception was held at the end of the Symposium.

## 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 2009, the Foundation's programs operated with the support of grants, contributions and an endowment support received for the fellowship awards and the Summer Institute on the Constitution from the following:

Ashland University  
The Atlantic Foundation  
Fairleigh S. Dickinson, Jr. Foundation, Inc.  
Federal Employees Workplace Campaign  
Fred A. Lennon Charitable Trust  
J. Willard and Alice S. Marriott Foundation  
McCormick Freedom Museum Project  
The Rhode Island Foundation  
The Henry Salvatori Foundation  
Hatton W. Sumners Foundation, Inc.  
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 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, 2009, the Fund had assets of \$8,129,869.03.



# James Madison Memorial Fellowship Foundation FY2009 (September 30, 2009)

## Balance Sheet

<u>Assets</u>		<u>Liabilities</u>	
<b>Undisbursed Balance</b>		<b>Current Liabilities</b>	
U.S. Treasury Account	\$2,056,130.15	Accounts Payable	<u>\$90,281.30</u>
		Total Current Liabilities	\$90,281.30
<b>Accounts Receivable</b>		<b>Equity</b>	
Imprest Fund	\$0.00	Beginning Balance	\$38,997,834.14
Receivables	305,917.55	Net Change (loss)	<u>403,767.31</u>
Interest on Investments	292,646.02	Total Equity	\$39,401,601.45
Total Current Assets	\$2,654,693.72		
<b>Fixed Assets</b>			
Long-term Investments (Treasuries)	\$36,837,189.03		
Total Net Fixed Assets	\$36,837,189.03		
<b>Total Assets</b>	<u>\$39,491,882.75</u>	<b>Total Liabilities &amp; Equity</b>	<u>\$39,491,882.75</u>

## Income and Expense Statement

<b>Income:</b>		<b>Expenses:</b>	
Interest on Investments	<u>\$2,220,467.55</u>	Fellowship Expenses	\$975,367.19
<b>Total Income</b>	<u>\$2,220,467.55</u>	Grant to Education Fund	\$0.00
		Operating Expenses (rent, salaries, etc.)	\$839,663.55
		Fund Raising Expenses	<u>\$1,669.50</u>
		<b>Total Expenses</b>	\$1,816,700.24
		<b>Net Income (loss)</b>	<u>\$403,767.31</u>

Note 1: 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, 2009 were \$8,129,869.03.

## Governance



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



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

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.



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



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



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



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



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



*John Richard Petrocik*  
University of  
Missouri-Columbia  
Columbia, MO



*Harvey M. Tettlebaum*  
Partner, Husch  
Blackwell Sanders  
Jefferson City, MO



*John J. Faso*  
Partner, Manatt,  
Phelps & Phillips  
Albany, NY



*Joseph Manchin*  
Governor,  
West Virginia



*Arne Duncan*  
Secretary of Education  
Ex Officio



*David O. Bickart*  
General Counsel  
Kaye, Scholer,  
Fierman, Hays &  
Handler  
Washington, D.C.



James Madison Fellows



Acting Chairman, Senator John Cornyn with Cari L. Gray, '08 (TX).



Elliott G. Rotvold, '08 (ND) at Mt. Vernon.



Joseph L. Cofield, '07 (FL), on a tour of the campus of Howard University.



2009 Congressional Fellow, Jeanne T. Salvado '96 (FL) with Congressman Chris Van Hollen.



James Madison Fellow, Michael L. Wilmoth '08, (KS) and Molly B. Feeney, '08 (ME), laying an honorary wreath at the tomb of George and Martha Washington.

***Foundation Staff***



**Norma Claytor**

*The Foundation staff and Board of Trustees would like to acknowledge the retirement of Ms. Norma Claytor, Special Assistant and Office Manager of the Foundation. Norma was an original employee of the Foundation when it was first organized. Her work and her skills helped to make the Foundation an efficient and effective organization. We will miss Norma at the Foundation and we hope she enjoys her well earned retirement. Thank you Norma for nearly two decades of service to the James Madison Memorial Fellowship Foundation.*

Paul A. Yost, Jr.  
President

Lewis F. Larsen  
Vice President and Director of Programs

Herman Belz  
Academic Director to the President

Anne Marie Kanakkanatt  
Special Assistant and Office Manager

Sheila Osbourne  
Academic Assistant

Elizabeth G. Ray  
Financial Analyst

Stephen W. Weiss  
Administration and Finance Director

***Foundation's Washington, D.C. Office***

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Iowa City, Iowa 52243-4030

1-800-525-6928  
1-319-337-1204 (Fax)  
e-mail: madison@act.org

**Foundation's Internet Address:**

[www.jamesmadison.gov](http://www.jamesmadison.gov)

**Fellowship applications are available online.**





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[www.jamesmadison.gov](http://www.jamesmadison.gov)

applications available on-line