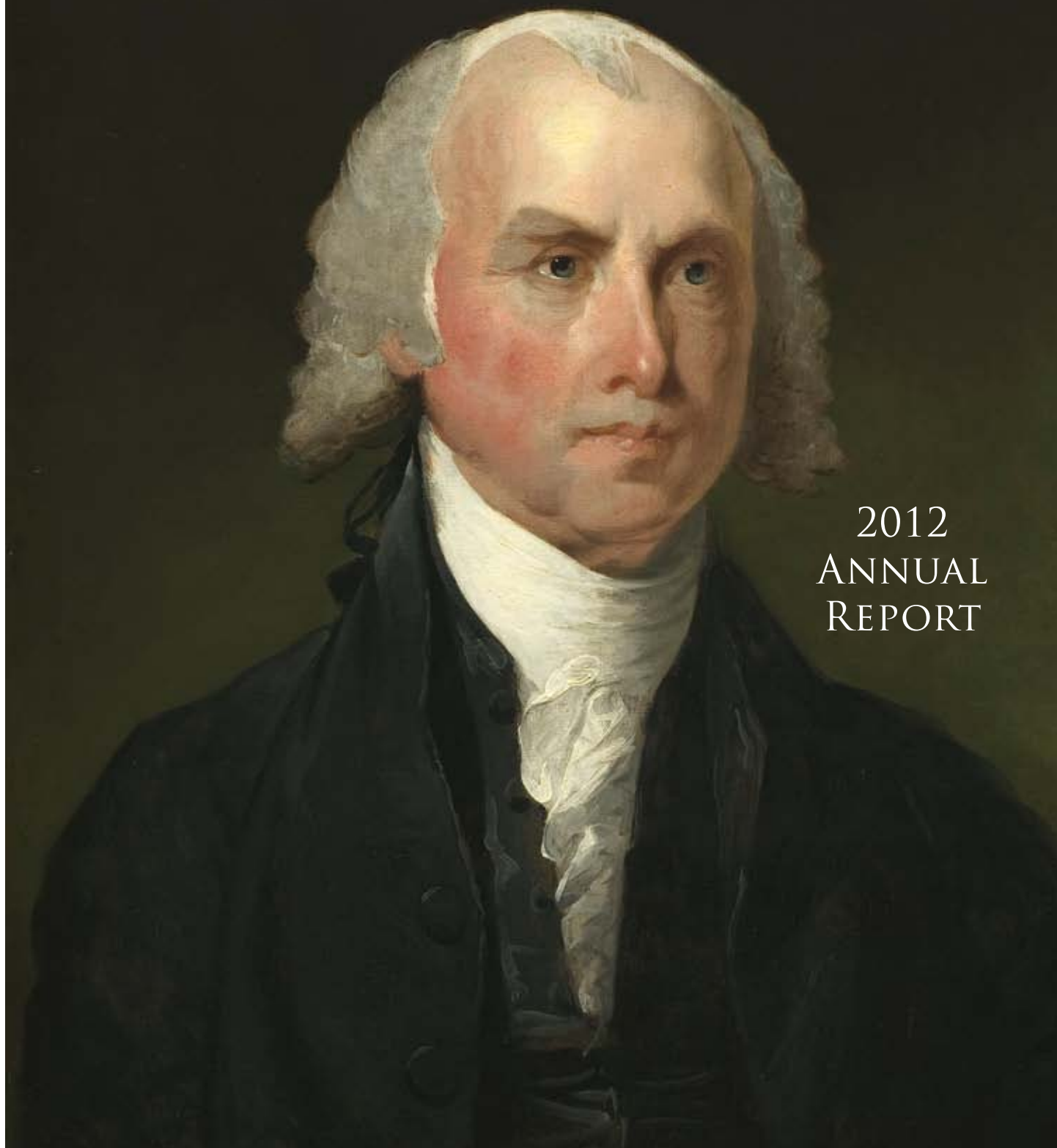


# JAMES MADISON MEMORIAL FELLOWSHIP FOUNDATION



2012  
ANNUAL  
REPORT



*2012 visit of the James Madison Fellows to James Madison's Montpelier home in Orange, VA.*

# James Madison Memorial Fellowship Foundation

## 2012 Annual Report

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## President's Letter

2012 was a banner year for the James Madison Memorial Fellowship Foundation, as we celebrated the 20th anniversary of awarding the first set of fellowships in 1992. In order to assess the impact and accomplishments of Fellows over the span of two decades, the Foundation conducted a professional development survey of all active Fellows in April 2012. I am happy to report the following:

- 100% of Fellows belong to one or more professional organizations
- 97% of Fellows encourage student participation in activities such as We the People or National History Day
- 68% of Fellows completed 5-10 professional development programs
- 42% of Fellows published a lesson plan, journal article, or book
- 24% of Fellows won awards for their teaching excellence
- 12% of Fellows serve in leadership roles in their professional organizations

During the past 20 years, Fellows have taught over 2 million students, and nearly 15% of those students have participated in co-curricular social studies activities. The survey confirmed what we already knew: James Madison Fellows are an outstanding cohort of educators who embrace professional development and educational opportunities because of their deep commitment to student excellence. We are inspired by the achievements of these Fellows and their students.

Since the inception of the Fellowship program, Madison Fellows have studied at nearly 400 colleges and universities around the nation. Members of the Class of 2012 matriculated at the following schools:

Adams State College  
American Military University  
American Public University  
American University  
Arcadia University  
Ashland University  
Azusa Pacific University  
California State University (Fullerton)  
Calvin College  
Columbia University  
DePaul University  
East Carolina University  
Emporia State University

George Mason University  
Georgia State University  
LaSalle University  
Marquette University  
New Mexico State University  
Northeastern University  
Northwestern University  
Providence College  
River College  
Sam Houston State University  
Southern Connecticut University  
Teachers' College, Columbia University  
Texas Women's College

University of Alabama  
University of Central Florida  
University of Dallas  
University of Illinois  
University of Michigan (Flint)  
University of Minnesota (Twin Cities)  
University of Nebraska  
University of Nevada (Reno)  
University of Virginia  
University of Wyoming  
Virginia Polytechnic Institute  
West Chester University  
Western Kentucky University

Finally, after several years of planning, the Foundation moved into our new offices in late July 2012. The finishing touches took a few extra months, but the new building—purchased by the James Madison Education Fund, Inc.—is definitely worth the financial investment. The Foundation pays rent to the Education Fund, so these monies remain available for future Foundation expenses. We encourage all Fellows and friends of the Foundation to stop by for a visit in our new Alexandria offices.

—Lewis F. Larsen

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## Academic Director's Letter

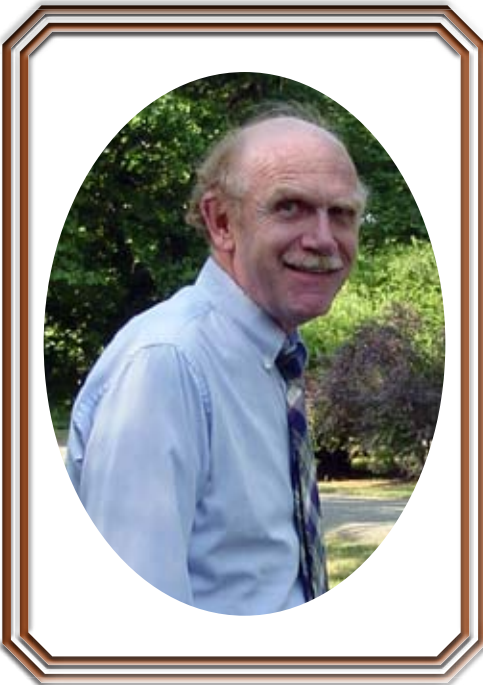
It has been a pleasure to serve as Director of the James Madison Memorial Fellowship Foundation Summer Institute on the Constitution since assuming the duties of Academic Director in 1995. The subject matter of the course—the foundations of American constitutionalism, broadly conceived—necessarily involves the disciplines of history and political science in a dialectical examination of fundamental principles of liberty, law, and limited government. This content makes for a provocative and enriching interdisciplinary experience not ordinarily available in the standard offerings of graduate school.

The intellectual range and diversity of the Summer Institute are complemented by the invigorating variety of regional, local, and intellectual and cultural traits and tendencies evinced by Madison Fellows from across the country. May I note too that quite as impressive as intellectual aptitude, if not more so, is the palpable sense of purpose, motive, and responsibility that Madison Fellows have brought to their academic work. Teaching and working with Madison Fellow graduate students has been an immensely rewarding intellectual and personal experience for which I am most grateful.

—Herman Belz

## Dr. Herman Belz Retires

In response to the Foundation's announcement about Dr. Belz's retirement plans, scores of Fellows submitted cards, letters, and lengthy emails in appreciation for his two decades of service to the Foundation and to the Fellows. Many of the emails are excerpted below, and the full text of all the emails (along with the cards and letters) will be presented to Dr. Belz when the Foundation celebrates his retirement.



Professor Belz expected that we read and wrestle and debate and understand the Constitution from every conceivable viewpoint. He was a demanding instructor, but he never failed to meet us with grace and good humor, and always with a sense that he was inviting us to meet a truly fascinating group of people: The Founders.

—Mary Kate Blaine, '00 (DC)

For the third paper that summer, I took a chance with the essay. I entitled it *Thirteen Angry States* and put the Constitution on trial. As I completed the first draft, I passed it around to some of my peers. Almost every person said, "He won't accept this. You will have to rewrite it." I submitted the paper as written, and he gave me an "A+." I honestly don't think I've ever been prouder of a grade in my life.

—Lynette Wallace, '96 (IN)

Dr. Belz has been the epicenter of the Madison program. The amazing program reflects his desire for a scholarly debate and enlightened discourse. He doesn't simply disseminate knowledge - he draws you into the debate with thought-provoking questions to ponder. Never one to give a pithy response, Dr. Belz was affectionately compared to a "benign hijacker." He eventually brought you to where you needed to go, but took you other places you never anticipated nor had thought about before.

—Richard Vanden Bosch, '03 (CA)

I am grateful for your leadership in crafting the course of study for the Summer Institute on the Constitution—also known as "academic boot camp." The Fellowship's goal is to boost the skill—and the passion—that history and government teachers bring to their craft, and, thanks to your leadership, that goal will continue to be achieved in countless teachers' lives. I can think of no greater gift that an educator can bestow than the one you have granted to a generation of teachers—an understanding of the legacy of liberty.—Gennie Burleson, '00 (TX)

Dr. Belz forced me to critically examine my ideas and beliefs about the Founding Era and I feel that I have a much greater understanding of that time period as well as our Constitution because of him. The fact that he pushed me has had a profound impact on my teaching - I feel more comfortable pushing my own students and am confident that I can help them grasp the complex topics surrounding the Constitution.

—Kymberli A. Wregglesworth, '11 (MI)

Dr. Belz's understanding of the Constitution regularly astounded us, and his lectures became the stuff of legends during our summer stay at Georgetown. His depth of knowledge, his dedication to his craft, and his gracious demeanor helped foster an intellectual and collegial environment.

—Stephen Popp, '03 (TX)



## Education Programs



2012 Summer Institute Participants meet with Associate Supreme Court Justice Ruth Bader Ginsburg. (Photo Courtesy of Steve Pettevay, Collection of the Supreme Court of the United States.)

### James Madison Fellowships

Fellowship awards constitute the core of the Foundation's programs. The Foundation conducts an annual nation-wide 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 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** for full-time graduate study toward a master's degree are awarded to college seniors and recent graduates who wish to become secondary school teachers of American history, American government, or social studies. 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 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 of the financial assistance plus interest. The Foundation strongly encourages Fellows to teach in their selection state when they complete their education.

## 2012 Fellowship Program



2012 Selection Committee members Alison Clark Efford and Erik Chaput, '03 (RI) review applications.

### 2012 James Madison Fellows

The Foundation conducted its twenty-first nationwide competition for fellowships during 2012. 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.

Listed to the right are individuals who served on the 2012 Fellowship Selection Committee. They independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships.

### 2012 Selection Committee Members

**Dr. Erik J. Chaput**  
2003 James Madison Fellow (RI)  
Graduate History Program Instructor  
Providence College  
Mount Vernon, MA

**Dr. Richard Dougherty**  
Associate Professor of Politics  
University of Dallas  
Irving, Texas

**Dr. Alison Clark Efford**  
Assistant Professor  
Marquette University  
Milwaukee, WI

**Dr. Todd Estes**  
Associate Professor of History  
Oakland University  
Rochester Hills, MI

**Ms. Mary Ferrari**  
Associate Professor  
Radford University  
Radford, VA

**Mr. Curtis A. Hansen**  
2001 James Madison Fellow (OH)  
Upper Arlington High School Teacher  
The Wellington School  
Hilliard, OH

**Mr. Brett Helm**  
1997 James Madison Fellow (NC)  
Director of Educational Implementation  
College Summit  
Arlington, VA

**Ms. Christine Kadonsky**  
2004 James Madison Fellow (WI)  
U.S. History Teacher  
Wausau, WI

**Dr. Stuart Leibiger**  
Associate Professor  
La Salle University  
North Wales, PA

**Mr. Curtis White**  
2004 James Madison Fellow (KS)  
Indian Woods Middle School  
Overland Park, KS

## 2012 Fellowship Awardees

### Current Teachers (Senior Fellows)

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

AZ	Allison M. Fluke	Rio Rico High School; Rio Rico, AZ
CA	Juan F. Resendez	Irvine High School; Irvine, CA
CO	Whitney Barnes	Lakewood Senior High School; Lakewood, CO
CT	Jennifer L. Britner	Berlin High School; Berlin, CT
DE	Joseph F. Gioffre	Salesianum School; Wilmington, DE
FL	Patricia C. Everett <sup>1</sup>	Father Lopez High School; Daytona Beach, FL
FL	Stephen Hansen	Winter Park High School; Winter Park, FL
FL	Kari M. Ramsey	Harmony High School; Harmony, FL
GA	Jason E. Butler	DeKalb Early College Academy; Stone Mountain, GA
GA	Kevin P. Rhoads	Dominion Christian School; Marietta, GA
ID	Joshua M. Warwick	Kimberly Middle School; Kimberly, GA
IL	Jeffrey Lobo <sup>2</sup>	Zion-Benton Township High School; Zion, IL
IN	Kyle J. Davis	Elkhart Memorial High School; Elkhart, IN
IA	Franklin W. Dea	Cumberland Anita Messina High School; Anita, IA
KS	Robert John Ovsak	Emporia Middle School; Emporia, KS
KY	Brett Alan Pritchett	University Heights Academy; Hopkinsville, KY
LA	Alicia Nicole Ferguson	Central Private School; Baker, LA
ME	Martin Schmeisser Bressler	Saint Dominic Regional High School; Auburn, ME
MD	Kimberly Cherie Moore <sup>3</sup>	Gaithersburg High School; Gaithersburg, MD
MD	Kathryn Marie Wathen	Westlake High School; Waldorf, MD
MA	Steven Patrick Moynihan	Barnstable High School; Hyannis, MA
MI	Anthony Robert Brey	Garber High School; Essexville, MI
MI	Tricia Kremke	Potters House High School; Grand Rapids, MI
MN	Eric Colin Swiggum Cameron	Metro Heights Academy; Columbia Heights, MN
MN	Shannon Mary McLean	Royalton High School; Royalton, MN
MS	DeAnna Rose Roessling	Biloxi High School; Biloxi, MS
MO	Gregory Joseph Brenner	Alta Vista Education Center; Kansas City, MO
MT	Brad M. Faulhaber	Sidney High School; Sidney, MT
NE	Tyler Maxon	Sacred Heart School; Lincoln, NE
NV	Kylie Irene Miller	Spanish Springs High School; Sparks, NV
NH	Stephen Bernard Vetack	Milford High School; Milford, NH
NJ	Andrew Vernon <sup>4</sup>	Woodbury High School; Woodbury, NJ
NJ	Samantha Western	Livingston High School; Livingston, NJ
NM	David Robert Scroggs	Arrowhead Park Early College High School; Las Cruces, NM
NY	Marc Skelton	Fannie Lou Hamer Freedom High School; New York, NY
NC	Brandi Layne Philipps	Pamlico County High School; Bayboro, NC
OH	Jason Milczewski	Revere High School; Richfield, OH
OK	Dionne Nichelle Lewis	Central Junior High School; Tulsa, OK
OR	Brian Kenneth Scott Johnson	Pendleton High School; Pendleton, OR
PA	Katherine L. Hagee	Wilson High School; West Lawn, PA

## 2012 Fellowship Awardees, cont.

RI	Bryan-Keith J. Nordan	Urban Collaborative Accelerated Program; Providence, RI
SC	Mark D. Welch	Walhalla Senior High School; Walhalla, SC
TN	Mark Harold Brunton	Saint Andrew's-Sewanee School; Sewanee, TN
TX	Maureen Mary Gray	Taylor High School; Taylor, TX
TX	Jennifer Stewart Venable	Waxahachie High School; Waxahachie, TX
UT	Cody L. Nesbit	Alta High School; Sandy, UT
VA	Cynthia Burgett	Rachel Carson Middle School; Herndon, VA
WA	Brock Anderson	Wahluke High School; Mattawa, WA
WV	Derek Hughes	Washington High School; Charles Town, WV
WI	James Edward Huston	Bloomer Senior High School; Bloomer, WI
WY	Brent Michael Jurgensen	Natrona County High School; Casper, WY

### Prospective Teachers (Junior Fellows)

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

AK	Nathan W. Walters	University of Minnesota, Twin Cities; Minneapolis, MN
AL	Melissa K. McDonough	University of Alabama; Tuscaloosa, AL
AR	Rebecca A. Schaeffer	Henderson State University; Arkadelphia, AR
CA	Alyse Romero <sup>5</sup>	California State University; San Bernardino, CA
CA	Kate A. Stephensen	Northwestern University; Evanston, IL
IL	Laura Koroski	Connecticut College; New London, CT
MO	Michael W. Stevenson <sup>6</sup>	University of Iowa; Iowa City, IA

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<sup>1</sup> Ms. Patricia C. Everett's fellowship, the J. Seward Johnson, Sr.-James Madison Fellowship, is endowed by the Atlantic Foundation of Princeton, New Jersey.

<sup>2</sup> Mr. Jeffrey Lobo's fellowship, the McCormick Foundation-James Madison Fellowship, is funded by the McCormick Foundation's Civic Program of Chicago, Illinois.

<sup>3</sup> Ms. Kimberly C. Moore'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, DC.

<sup>4</sup> Mr. Andrew Vernon's fellowship, the Fairleigh S. Dickinson, Jr.-James Madison Fellowship, is endowed by the Fairleigh S. Dickinson, Jr. Foundation, Inc., of Delray Beach, Florida.

<sup>5</sup> Ms. Alyse Romero's fellowship, the Henry Salvatori-James Madison Fellowship, is endowed by the Henry Salvatori Foundation.

<sup>6</sup> Mr. Michael W. Stevenson's fellowship, "The Fellows' Fellowship," is funded in part by contributions from current and alumni James Madison Fellows.



## Summer Institute on the Constitution



The 2012 Summer Institute on the Constitution was held from June 16, 2012 to July 13, 2012. A total of 52 James Madison Fellows, representing nearly every state, attended the Institute. The Foundation also invited two Cuban Fellows to join the Institute.

The Institute took place on the campus of Georgetown University and was the twentieth 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 scholarship on the subject.

Each academic day began with one and one half-hour lecture given by one of the four Institute professors. Following the lecture and 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 professors. Afternoon sessions continued the constitutional conversations.

The Institute included tours of historic sites associated with the Founding period, specifically Mt. Vernon, Monticello, and Montpelier. Course lectures were also given at these sites. Fellows visited the U.S. Supreme Court and met with Associate Justice Ruth Bader Ginsburg. They also visited the courtroom of Judge Royce C. Lamberth, Chief Judge of the U.S. District Court for the District of Columbia.

The Fellow’s academic progress was evaluated through two written papers. Fellow were also evaluated on class participation.

# James Madison



2012 Summer Institute Professors: Dr. Jeffrey Morrison, Dr. Marion Nelson, Dr. Herman Belz (Academic Director), and Dr. Daniel Dreisbach.

**Faculty.** The course was directed and taught by Professor Herman Belz, the Foundation's Director of Academics and Professor of History, *emeritus*, at the University of Maryland; Dr. Jeffrey H. Morrison, Assistant Professor of Government, Regent University; Dr. Daniel Dreisbach, 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 2012 Institute. The academic program continues to be rigorous and challenging for the participants. Many collegial friendships were made among the Fellows.



Peter Bartels, '11 (MI) poses with the James and Dolley Madison statue during the annual visit to Montpelier.



## Communication and Outreach

The Foundation conducts two types of outreach: one for prospective Fellows and the public, and one for current Fellows.

Outreach to prospective Fellows takes a wide variety of forms. Over 6.5 million people saw the Foundation's new Google Ad (and 12,000 of those people clicked on the Foundation's URL). In 2012, nearly 30,000 education professionals received brochures about the Fellowship program. 1500 emails were sent to Foundation Faculty Representatives. 800 college and university faculty received personal letters about the fellowship program. Close to 500 educators interacted with Fellows at two annual conferences: the National Council for the Social Studies (NCSS) and the National Council for History Education. Print ads appeared in *Social Education*, the journal of the NCSS; and the *Magazine of History*, the journal of the Organization of American Historians. The Foundation also partnered with two organizations whose missions complement the Foundation's: the National

Society of the Daughters of the American Revolution and the Veterans of Foreign Wars. As a result of all these efforts, 49,372 unique individuals visited the Foundation's website in 2012—an increase from 2011 of 132%.

Throughout the year, the Foundation asks Fellows to identify and mentor potential Fellows. To formalize this process, a new initiative, the Madison Fellowship Nomination Program, was launched in Fall 2012. Fellows nominated outstanding potential candidates, and each nominee received a letter from the Foundation encouraging them to apply. 55 individuals were nominated, and 19 of them submitted applications for the 2013 Fellowship.

In order to provide a forum for information about professional opportunities, the Foundation created a LinkedIn group in August, 2012 for all James Madison Fellows. Nearly 200 Fellows have joined, sharing news about job opportunities and job requests.

*Madison Notes*, the annual publication of the Foundation, is mailed to all James Madison Fellows, as well as to friends of the Foundation. The 2012 edition (published in March 2013) was the longest edition in the Foundation's history: 24 pages filled with news about Fellows and the increasingly significant impact they are having on civics education in America.

The *Madison Memo* is a quarterly newsletter sent via email to all Fellows, containing scholarly articles, teaching suggestions, features on Fellows, and Foundation updates. Over 50% of all recipients open the *Madison Memo*, a rate far exceeding the open-rate of 20% for educational publications.

Finally, the Foundation publishes annually an updated Fellows Directory. A limited number of hard copies are printed, and the entire document is available to Fellows as a PDF on the Foundation website.

## James Madison Symposium

When discussing constitutional issues, Madison Fellows often ask themselves, "What would Jemmy say?" Anyone who attended the 2012 James Madison Symposium, held on July 12 in Georgetown University's Copley Formal Lounge, is now well-equipped to answer that question thanks to our speaker, Dr. Stuart Leibiger. Dr. Leibiger is an Associate Professor and Chair of the History Department at La Salle University and author of *Founding Friendship: George Washington, James Madison and the Creation of the American Republic*. An expert on all things Madison, Dr. Leibiger spoke to Summer Institute participants, other Fellows, and guests about *James Madison: Republican Revolutionary--An Overview of Madison's 1780's-1790's Political Career*.

Tracing the evolution of Madison's political thinking, Dr. Leibiger made a convincing case for Madison's consistent support for balanced government throughout his long public life:

*When the states were too strong (1780s), he wanted a stronger federal government. When the federal government became too strong (1790s), he wanted stronger state governments. Was he being inconsistent? No! He was searching for the elusive federal-state balance of power, the Madisonian Medium. It is the eternal question in American politics from the 18th century to today.*



## Development

The Foundation is currently able, through income from its endowment and from the gifts received or promised, to offer at least one domestic fellowship to 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 from 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 FY2012, the Foundation's programs operated with the support of grants, contributions, and an endowment received for the fellowship awards and the Summer Institute on the Constitution from the following:

- The Atlantic Foundation
- Fairleigh S. Dickinson, Jr. Foundation, Inc.
- J. Willard and Alice S. Marriott Foundation
- McCormick Foundation Civics Program
- The Henry Salvatori Foundation

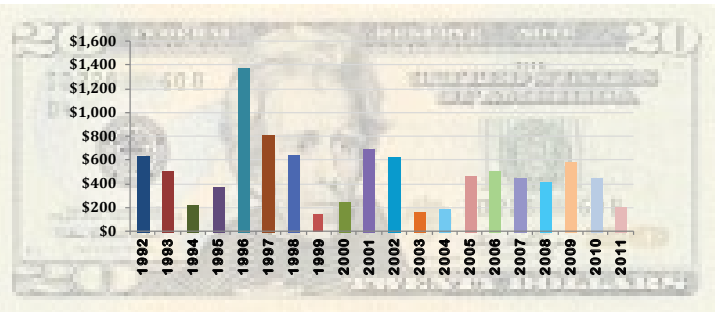
Approximately 25% of all Fellowships are awarded to Junior Fellows. Younger teachers have a long career path ahead of them, so the Foundation would like to increase this percentage. After surveying all Junior Fellows in October 2012, seeking input about reaching out to college students, the Foundation mailed this new poster to the History and Fellowship Departments of over 400 universities in ten states. We will expand this program next year.



### 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, 2012, the Fund had assets of \$7,913,832.44.

### Celebrating Twenty Years of Fellows Teaching the Constitution



Total Contribution by Class

During the 2012 annual campaign, *Celebrating Twenty Years of Fellows Teaching the Constitution*, the Foundation encouraged Fellows to contribute in multiples of \$20 to commemorate the past two decades of fellowship awards.

186 Fellows contributed a total of \$9,984 to the James Madison Education Fund, Inc., an increase from last year of 25%. Gifts ranged in size from \$20-\$500, with an average donation of \$53.67. Seventy Fellows donated for the first time, and contributors came from every single class and all but four states.

The Class of 2010 had the highest participation, with fifteen Fellows contributing; the Class of 1996 had fourteen. The Class of 1996 led in the total dollar amount donated (\$1,370) followed by the Class of 1997 (\$828).

The goal of each campaign is to raise \$24,000—enough to completely fund one fellowship. If all James Madison Fellows were to contribute at least \$25, that goal would be achieved. The 2013 campaign, *Summer in the City: Remembering Two Decades of Summer Institutes*, will build on the success of the 2012 campaign.

# James Madison Memorial Fellowship Foundation FY2012 (September 30, 2012)

## BALANCE SHEET As of September 30, 2012 and 2011

	2012	2011
<b>Assets:</b>		
Intragovernmental:		
Fund Balance With Treasury	\$ 2,301,809	\$ 2,338,241
Investments	37,123,858	37,109,430
Total Intragovernmental	39,425,667	39,447,671
Accounts Receivable, net	289,620	273,351
<b>Total Assets</b>	<b>\$ 39,715,287</b>	<b>\$ 39,721,022</b>
 <b>Liabilities:</b>		
Intragovernmental:		
Other	\$ 4,522	\$ 3,909
Total Intragovernmental	4,522	3,909
Liabilities With the Public:		
Accounts Payable	\$ 32,296	\$ 302,697
Other	58,432	52,427
Total Liabilities With the Public	90,728	355,124
<b>Total Liabilities</b>	<b>\$ 95,250</b>	<b>\$ 359,033</b>
 <b>Net Position:</b>		
Cumulative Results of Operations		
- Earmarked Funds	\$ 39,620,037	\$ 39,361,989
Total Net Position	39,620,037	39,361,989
<b>Total Liabilities and Net Position</b>	<b>\$ 39,715,287</b>	<b>\$ 39,721,022</b>

## STATEMENT OF NET COST For the Years Ended September 30, 2012 and 2011

	2012	2011
<b>Program Costs:</b>		
Gross Costs	\$ 1,977,900	\$ 1,952,141
Net Program Costs	\$ 1,977,900	\$ 1,952,141
Net Costs of Operations	\$ 1,977,900	\$ 1,952,141

Note: 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, 2012 were \$7,913,832.44.

## Governance



John Cornyn  
Chairman  
U.S. Senator, TX



Catherine Allgor  
Nadine and Robert A. Skotheim Director of Education  
Huntington Library,  
Art Collections, and  
Botanical Gardens



Benjamin L. Cardin  
U.S. Senator, MD



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



William Terrell Hodges  
Judge, U.S. Middle District of Florida  
Gainesville, FL



John J. Faso  
Partner, Manatt, Phelps & Philips  
Albany, NY



Pauline Maier  
William R. Kenan, Jr.  
Professor of American History, MIT



Drew R. McCoy  
Clark University  
Worcester, MA



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



Arne Duncan  
Secretary of Education  
Ex Officio



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

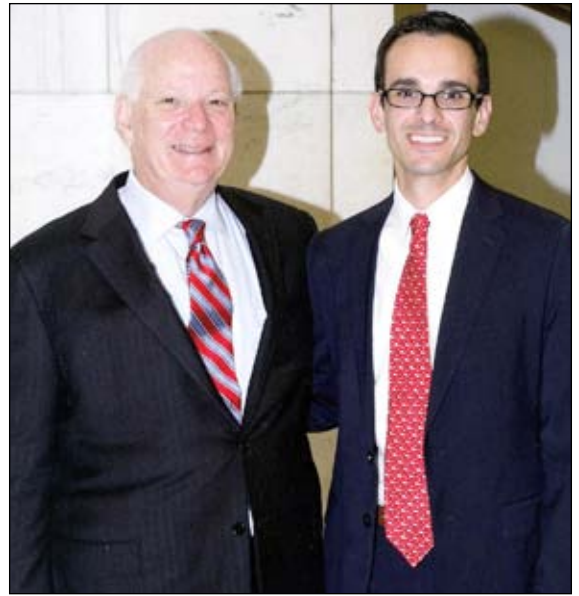
The Foundation is governed by a Board of Trustees consisting of thirteen members. Twelve members--two members of the Senate, two members of the House of Representatives, two members of the federal judiciary, one governor, two members of the general public, and three members of the academic community--are 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 judges and the Secretary of Education, board membership is evenly divided between political parties. There are currently two vacancies on the Board.

In 2012, President Obama appointed Professor Catherine Allgor and Professor Pauline Maier to the Board of Trustees. Professor Drew McCoy was also re-appointed for a second six year term.

# James Madison Fellows



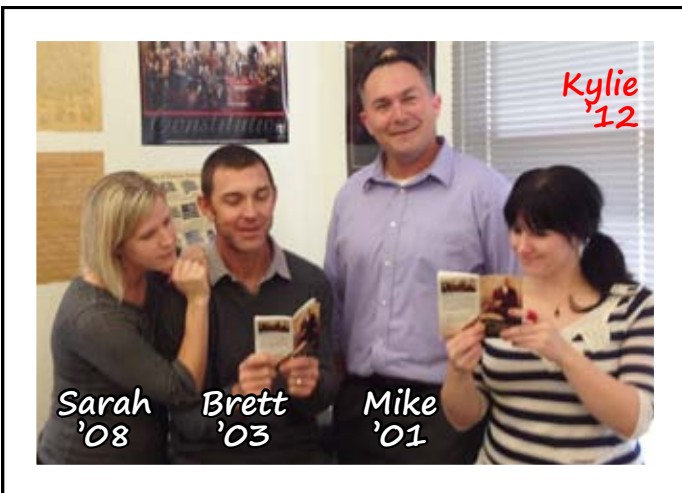
*Kathryn Shaughnessy Wendling, '04 (WI) and Brooks Humphreys, '05 (NE) share the spotlight with Jeopardy Host Alex Trebeck. (Photos from Sony Pictures/Television.)*



*Joe Sangillo, '06 (MD), 2012 Congressional Fellow, meets with Senator Ben Cardin (D-MD).*



*The Foundation is happy to recognize the first Father-Daughter Fellows: Tim McClean, '98 (MN) and daughter Shannon McClean, '12 (MN).*



*Sarah Brown, '08 (NV), Brett Barry, '03 (NV), Mike Bowers, '01 (NV), and Kylie Miller '12 (NV) all teach social studies at Spanish Springs High School in Sparks, NV, one of two school in the country with four Fellows on their staff. (The other is Salesianum High School in Delaware.)*



*Mike Wilmoth, '08 (KS) (far right) officiates at an NFL game between the Denver Broncos and the Seattle Seahawks. Serving as an NFL replacement official was, according to Mike, "Living the dream!"*

# 20 Years of Summer Institutes

The first Summer Institute of the James Madison Memorial Fellowship Foundation was held in July 1993. 56 Fellows from the Inaugural Class of 1992 gathered at American University for a month-long examination of the Constitution and America's Founding principles. Since that first Institute, much has changed:

Then	Now
American University	Georgetown University
Desktops	Ipads
Quigley's	The Tombs
20 books	10 Books
2 original research papers	2 analytical essays
DuPonts at Montpelier	Madisons at Montpelier
Libraries	Google
Antonin Scalia	Sonia Sotomayor
Baseball at Camden Yards	Baseball at National's Park

But . . . some things have not changed. Every Summer Institute in the past twenty years has included

- Inspirational faculty, encouraging Fellows to intellectually "bend and stretch"
- Demanding primary sources, challenging Fellows to develop their analytical skills
- Professor Ed Smith, sharing with Fellows his unique vision of Washington, DC
- University housing, reminding Fellows of their own college dorm days
- Excursions to historic sites, providing memories for Fellows to share with their students
- Collegial and convivial classmates, creating for Fellows lifetime professional and personal connections
- And, most significantly, thoughtful and purposeful study of the American constitutional system, empowering Fellows to pass on their understanding of our Founding principles to their students



Fun and spirited games to relieve the stress of studying. . . The Black History tour of Washington, DC offered great information that I have used for more than 20 years in my classes. The very thoughtful lecture style of Dr. Belz and his explanation of how the Constitution dealt with the slavery issue is something else which I've used for 20 years in both high school and university teaching. . . It was a great time filled with tremendous learning, tours of important places, and opportunities to get to know some great people.

—William (Bus) Gillespie, '95 (UT)

When I was checking into Copley Hall for the 2005 Summer Institute, I was delighted to learn that my next door neighbor would be Cheryl Cook-Kallio (CA-97) who was returning to D.C. for a federal courts fellowship through the James Madison Foundation. You see, Cheryl is kind of a big deal: a Madison Fellow, a Madison Congressional Fellow, a Madison Federal Courts Fellow, an accomplished *We the People* teacher, and even an elected official in her hometown of Pleasanton, CA! Needless to say, it was so much fun spending the summer with her.

—Emma Kiziah Humphries, '95 (FL)



Visiting the "highest court in the land": the basketball court on the top floor of the Supreme Court building. . . Orrin Hatch, Ted Kennedy, and Antonin Scalia interacting with Fellows. . . Admiral Yost and "sea" stories. . . The first (and only?) elevator malfunction with a number of Fellows stuck between floors at American University. Nothing like being rescued by a "fire rescue team" on a calm, quiet day at AU. . . I'm impressed that I could remember this much. At this point in my life, I've forgotten most of what has happened—and gotten over the remainder.

—Audrey Micaletti, '92 (PA)







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