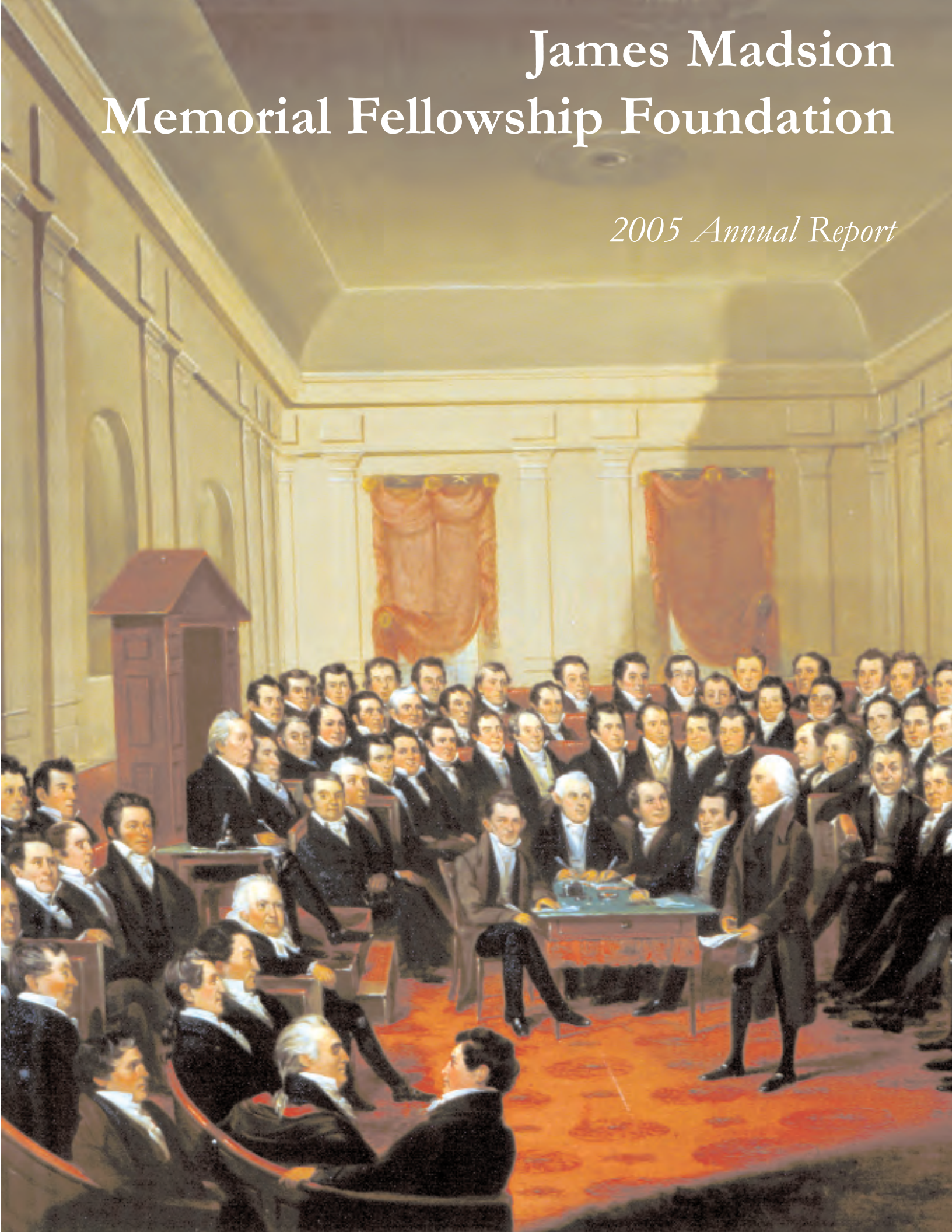


# James Madsion Memorial Fellowship Foundation

*2005 Annual Report*





# James Madison Memorial Fellowship Foundation

## 2005 Annual Report



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## President's Letter



With the class of 2006, we will have awarded over 1,000 fellowships since our inception in 1990. That means there will be over a thousand constitutional scholars in secondary schools throughout the United States who would not be there absent this program. This, in turn, enables between one hundred and two hundred thousand students a year to learn about the Constitution from a James Madison scholar-teacher.

A private donor recently suggested to me that what we are doing is a "drop in the bucket." I'm afraid I take the opposite view. Through their service as senior scholars in social studies departments, as officers and members of the National Council of Social Studies, as responsible citizens in their communities and states, and as professional leaders in their school districts, James Madison Fellows are educating fellow Americans in the virtues and rewards of constitutional government. In these varied roles, Madison Fellows contribute their views on such constitutional issues as the confirmation of a new Chief Justice of the United States, the responsibility of state and federal agencies in hurricane disaster relief, the role of the Federal government in the "right to die" issue, and the principle of stare decisis as it relates to *Roe v. Wade*.

If what we do is a "drop in the bucket," it is the drop that "leavens the loaf." I salute our one thousand James Madison Fellows both in their roles as teachers and as citizens. We have better schools and communities because of you.

A handwritten signature in blue ink that reads "Paul A. Yost, Jr." The signature is written in a cursive, flowing style.

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 on a tour at Monticello.*

mum 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.



## 2005 Fellowship Program



*Fellowship Selection Committee reading applications*

### 2005 James Madison Fellows

The Foundation conducted its thirteenth nationwide competition for fellowships during 2005. From eligible applicants, 54 individuals were selected as James Madison Fellows. Funding from private donors allowed the Foundation to award additional fellowships in several states.

The following individuals served as members of the 2005 Fellow Selection Committee; they independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships:

### 2005 Selection Committee Members

**Dr. Craig T. Cobane**

Assistant Professor  
Culver Stockton College  
Canton, MO

**Mr. Stephen Frank**

V.P. of Exhibits & Research  
National Constitution Center  
Philadelphia, PA 19106

**Mr. Samuel J. Tomarelli**

'97 James Madison Fellow  
Teacher, Portsmouth High School  
Portsmouth, NH

**Ms. Cheryl Cook-Kallio**

'97 James Madison Fellow  
Teacher, Irvington High School  
Freemont, CA 94566

**Mr. Thomas S. O'Hare**

'00 James Madison Fellow  
Teacher, Wilson Hall  
Sumter, SC

**Ms. Victoria Vergara**

'98 James Madison Fellow  
Teacher, Thomas Edison High School  
Alexandria, VA

**Mr. Douglas N. Cutchins**

'94 James Madison Fellow  
Director of Social Commitment  
Grinnell College  
Grinnell, IA

**Dr. Camille A. Stillwell**

National Scholarship Coordinator  
University of Maryland  
College Park, MD 20742

**Mr. Matthew Franck**

Professor and Chairman  
Department of Political Science  
Radford University  
Radford, VA

**Dr. Leslie W. Skinner**

'92 James Madison Fellow  
Education Associate, Social  
Studies/Assessment  
South Carolina Department of  
Education  
Columbia, SC

## 2005 Fellowship Awardees

### Current Teachers (Senior Fellows)

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

Alabama	Bradley K. Lewis	Ardmore High School; Ardmore, AL
Alaska	Charles B. Abolafia	Bethel Regional High School; Bethel, AK
Arizona	Megan M. Kirts	Sabino High School; Tucson, AZ
Colorado	Debra M. Scott-Jensen	Clear Creek High School; Evergreen, CO
Connecticut	Douglas L. Craig	Windham High School; Willimantic, CT
Delaware	Michael J. Feldman	Smyrna High School; Smyrna, DE
D.C.	Matthew E. Schilling	Winston Churchill High School; Potomac, MD
Florida	Melani R. Winter	Keswick Christian School; St. Petersburg, FL
Illinois	Catherine E. Peters-Bishir	Neuqua Valley High School; Naperville, IL
Indiana	Joshua R. Thompson	Loogootee Jr-Sr High School; Loogootee, IN
Iowa	Jacqueline A. Norris	Ames High School; Ames, IA
Kansas	Kara E. Belew	Campus High School; Wichita, KS
Louisiana	Lisa M. Owens	Homer High School; Homer, LA
Maryland	Gregory C. Dutton	Wilde Lake Middle School; Columbia, MD
Mississippi	Thomas A. Chapman	Simmons High School; Hollandale, MS
Missouri	Lisa M. Smith	Saeger Middle School; Saint Charles, MO
Nebraska	William B. Humphreys	Brownell-Talbot School; Omaha, NE
Nevada	Joseph E. Enge	Carson High School; Carson City, NV
New Mexico	Bruce R. Smith	Rio Rancho High School; Rio Rancho, NM
North Dakota	Daniel V. Wakefield	Devils Lake High School; Devils Lake, ND
Oklahoma	Ronald W. Parker	Star Spencer High School; Spencer, OK
Pennsylvania	Carl F. Ackerman	W. B. Saul H. S. Agric Science; Philadelphia, PA
Rhode Island	Natalie L. O'Brien	North Smithfield Jr-Sr High School; North Smithfield, RI
South Carolina	Idell R. Koury	Southside Christian School; Simpsonville, SC
Tennessee	Jennifer L. Gill	Pope John Paul II High School; Hendersonville, TN
Texas	Marcie R. Warner	Amon Carter-Riverside High School; Ft Worth, TX
Utah	Lynette Lake	Brighton High School; Salt Lake City, UT
Washington	Lindsey M. Hatch	Tahoma High School; Covington, WA
Wisconsin	Alison A. Turner	Sauk Prairie High School; Prairie Du Sac, WI
Wyoming	Tyson J. Emborg	Sheridan High School; Sheridan, WY

## 2005 Fellowship Awardees, cont.

### Prospective Teachers (Junior Fellows)

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

Alabama	Karen L. Boone	Athens State University; Athens, AL
California	Melissa S. Binder	California Lutheran University; Thousand Oaks, CA
California	Elisa Perez	Georgetown University; Washington, DC
Florida	Stacey L. Repass	University of Central Florida; Orlando, FL
Georgia	Daniel E. Waldroup	University of Georgia; Athens, GA
Kentucky	Patrick A. Smith	University of Kentucky; Lexington, KY
Massachusetts	Annie R. Pegg	University of Massachusetts-Dartmouth; N. Dartmouth, MA
Michigan	Kristin E. James	Lake Superior State University; Sault Sainte Marie, MI
Minnesota	Cara H. Sandberg	Brown University; Providence, RI
New Jersey	Anicle Perez	Rutgers College, New Brunswick, NJ
New Jersey	Ronald G. Schildge	Middlebury College; Middlebury, VT
New York	Emily J. Lemanczyk	Hamilton College; Clinton, NY
North Carolina	Jessica L. Stone	University of North Carolina-Chapel Hill; Chapel Hill, NC
Ohio	Travis R. Glendenning	Ohio University; Athens, OH
South Dakota	Matthew R. Moore	North Dakota State University; Fargo, ND
Texas	Anisa L. Coates	University of North Texas; Denton, TX
Virginia	Allison R. Paskett	Southern Virginia University; Buena Vista, VA
West Virginia	Arysta N. McGill	Marshall University; Huntington, WV

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

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

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

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

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





## Summer Institute on the Constitution



Senator Kennedy speaking to the Fellows.



Fellows on tour at Monticello.

The 2005 Summer Institute on the Constitution was held from June 25, 2005 to July 22, 2005. A total of 52 James Madison Fellows, representing nearly every state, attended the Institute. An additional participant was a native of Havana, Cuba who is a school teacher in Florida.

The Institute took place on the campus of Georgetown University and was the twelfth annual Institute held by the Foundation. Georgetown University awarded six graduate credits to each participant.

**The Program.** The course offered at the Institute was History 520-10, "Foundations of American Constitutionalism." The course examined in depth the intellectual, cultural, social, and political context of the creation of constitutional government in the American colonies and in the American Republic during and after the Revolution. The course blended perspectives of history and political science as participating Fellows engaged in close study of contemporary source materials such as the debates in the Constitutional Convention, *The Federalist*, and Antifederalist writings, as well as the best current scholarship on the subject.

Each academic day began with a one and one 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. One day was spent at the Supreme Court where the Clerk of the Court addressed the Fellows



about the Supreme Court and the judiciary. Professor Edward Smith of the American University gave special tours of Arlington Cemetery, the African American Presence in Washington, D.C., and Capitol Hill.

The Fellow's academic progress was evaluated through three written papers/examinations. Fellows were also evaluated on class participation. Every participant in the 2005 Institute completed the course successfully.

The Foundation staff handled all administrative aspects of the Institute including working with the University on housing and food services. Additionally, the staff worked with individual Fellows in handling personal issues that may have arisen.

**Faculty.** The course was directed and taught by Dr. Herman Belz, the Foundation's Academic Advisor and Professor of History at the University of Maryland; Dr. Suzette Hemberger, Independent Scholar; Dr. 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.

**Conclusion.** The Fellows were academically focused and worked hard during the 2005 Institute. The academic program continues to be rigorous and challenging for the participants. Many collegial friendships were made among the Fellows.



Professor Morrison with Curtis White of Kansas.



Fellows at Arlington Cemetery.

## 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.com](http://www.jamesmadison.com).

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 2005 Symposium was held on July 8, 2005 in the Hart Senate Office Building. The topic of the Symposium was "The Gift Outright: Repaying the Legacy of the American Founding." Professor Herman Belz, the Foundation's Academic Director acted as Master of Ceremonies at the Symposium.

The Foundation invited Dr. Colleen Sheehan, Professor of Political Science at Villanova University to speak at the Symposium. Dr. Sheehan's principle fields of research and teaching are political philosophy and the American Founding. She is the author of numerous scholarly articles, including "Public Opinion and the Formation of Civic Character in Madison's Republican Theory," *The Review of Politics* (2005), "Madison v. Hamilton: The Battle Over Republicanism and the Role of Public Opinion," *American Political Science Review* (2004), and "Madison and the French Enlightenment: The Authority of Public Opinion," *William and Mary Quarterly* (2002). Professor Sheehan is co-editor of *Friends of the Constitution: Writings of the "Other" Federalists* (1998) and she is preparing a



book manuscript, "American Dream: James Madison's Vision of Republican Self-Government." She is the recipient of numerous awards, including fellowships from the National Endowment for the Humanities, The Templeton Foundation, Earhart Foundation, and the James Madison Program in American Ideals and Institutions, Princeton University. Professor Sheehan served in the Pennsylvania House of Representatives, 1995-96 and was a member of the Governor's Advisory Committee on Academic Standards, 1995-98.

Dr. Sheehan quoted from Robert Frost's poem, "The Gift Outright," which Frost delivered at the inauguration of President John F. Kennedy in 1961. She explained that every generation of Americans is indebted to the Founders of the nation for their deeds of war and their deed of the gift of independence. The Founders' legacy is encapsulated in the principles of the Declaration of Independence and the Constitution. The focus of Dr. Sheehan's talk was the fruitful and enduring relationship between Thomas Jefferson and James Madison as builders of the American Constitution—a "deed of gift" which is executed and delivered without consideration or expectation of return.



## 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 solely and directly to funding the graduate study of experienced and aspiring teachers. Donations may be directed to the support of fellowships in particular states or for fellowships in a national pool--all of which are selected according to the consistent criteria and standards governing the Foundation's selection process.



### James Madison-Bill of Rights Commemorative Coins

A special series of commemorative coins honoring James Madison and the Bill of Rights was authorized by Congress and minted by the United States Mint in 1993. Surcharges, added to the retail price of the coins, were provided to the Foundation's endowment. In recognition of the large amount of funds raised by the sale of the coins, the Foundation acknowledges its gratitude to the coin collectors of America who purchased these coins in support of the education programs of the Foundation and offers this acknowledgement in each annual report.

### Donations and Contributions

During FY 2005, 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  
The Henry Salvatori Foundation  
Anonymous Foundation, California



### 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, 2005, the Fund had assets of \$7,558,227.68.

# James Madison Memorial Fellowship Foundation FY2005 (September 30, 2005)

## Balance Sheet

<u>Assets</u>		<u>Liabilities</u>	
<b>Undisbursed Balance</b>		<b>Current Liabilities</b>	
U.S. Treasury Account	\$1,523,735.01	Accounts Payable	<u>\$25,617.13</u>
		Total Current Liabilities	\$25,617.13
<b>Accounts Receivable</b>		<b>Equity</b>	
Imprest Fund	\$0.00	Beginning Balance	\$38,319,635.21
Receivables	\$11,809.35	Net Change (loss)	<u>\$238,170.77</u>
Interest on Investments	\$299,539.58	Total Equity	\$38,557,805.98
Total Current Assets	\$1,835,083.94		
<b>Fixed Assets</b>			
Long-term Investments (Treasuries)	\$36,748,339.17		
Total Net Fixed Assets	\$36,748,339.17		
<b>Total Assets (See note 1)</b>	<u>\$38,583,423.11</u>	<b>Total Liabilities &amp; Equity</b>	<u>\$38,583,423.11</u>

## Income and Expense Statement

<b>Income:</b>		<b>Expenses:</b>	
Interest on Investments	<u>\$2,239,974.60</u>	Fellowship Expenses	\$1,266,197.56
<b>Total Income</b>	<u>\$2,239,974.60</u>	Grant to Education Fund	\$0.00
		Operating Expenses (rent, salaries, etc.)	\$733,922.84
		Fund Raising Expenses	<u>\$1,683.43</u>
		<b>Total Expenses</b>	<u>\$2,001,803.83</u>
		<b>Net Income (loss)</b>	<u>\$238,170.77</u>

Note 1: An independent not-for-profit organization, the James Madison Education Fund, Inc. provides additional financial support for the programs of the Foundation. The total assets of this Fund on September 30, 2005 were \$7,558,227.68.



## 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*



*Drew R. McCoy, Clark  
University, Worcester,  
MA*



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



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



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



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



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



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



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



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



*Jay Phillip Greene,  
University of Arkansas,  
Fayetteville, AK*



*Margaret Spellings  
Secretary of  
Education  
Ex Officio*

James Madison Fellows



Aaron Hinton of Wyoming with Senator Orrin G. Hatch.



Jennifer Seal of Oklahoma, the 2005 Congressional Fellow.



Picnic lunch for the Fellows at Montpelier.



Fellows at Monticello.



Daniel Gallagher of Maryland.



Steve Popp of Texas.



Senator Hatch and Senator Kennedy speaking to the Fellows.





Garden temple at Monticello.

## *Foundation Staff*

Paul A. Yost, Jr.  
President

Herman Belz  
Academic Advisor to the President

Norma J. Claytor  
Special Assistant and Office Manager

Lewis F. Larsen  
Vice President and Director of Programs

Sheila Osbourne  
Academic Assistant

Elizabeth G. Ray  
Program Analyst

Stephen W. Weiss  
Administration and Finance Director

## *Foundation Office*

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202-653-6045 fax

### *For fellowship applications contact:*

James Madison Memorial Fellowship Program  
P.O. Box 4030  
Iowa City, Iowa 52243-4030

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

### *Foundation's Internet Address:*

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



S M A D I S O N  
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applications available on-lin