



2010 visit of the James Madison Fellows to James Madison's Montpelier home in Orange, Virginia.

James Madison Memorial Fellowship Foundation

2010 Annual Report

Table of Contents

President's Letter	1
Education Programs	2
2010 Fellowship Program	3
Senior Fellows	4
Junior Fellows	5
Private Donors	5, 9
Summer Institute on the Constitution	6
Communication	8
James Madison Symposium	8
Development	9
Financial Statements	10
Governance	11
Foundation Staff	13

A Tribute to Admiral Paul A. Yost, Jr. Founding President of the Foundation



President's Letter



Working at the James Madison Memorial Fellowship Foundation is most rewarding because of the goals of the Foundation, as well as the efforts of our fine staff. It is thrilling for us to see as many as thirty James Madison Fellows teaching the Constitution in each state.

After two decades of stable operations, the Foundation has experienced many recent changes. We lost our chairman, Senator Edward M. Kennedy, so President Obama appointed Maryland Senator Ben Cardin to fill this vacancy. The Board of Trustees then elected Senator John Cornyn, our great supporter and champion, to be our new Chairman. Admiral Paul A. Yost, Jr., President Emeritus, retired last spring, and I was appointed to take his place. Our Director of Administration and Finance, Steve Weiss, passed away last December, and Elizabeth Ray moved up to fill Steve's duties. Finally, with our long term lease coming due, we are considering a variety of options for the future location of our office.

The Foundation is financially sound, although we have been challenged with rising costs. Our largest growing expenditure is the tuition for our Fellows. The cost of higher education will continue to be a concern for the Foundation—and for our Fellows-- in the future.

It is an honor for me to direct this important national program. As a Foundation, we focus on the growth of our program so we can offer even more fellowships to outstanding teachers. As a staff, we are united in

our commitment to serve our James Madison Fellows however we can. As citizens, we remember that it is the students of America who are the ultimate beneficiaries of the work we do.

A handwritten signature in blue ink that reads "Lewis F. Larsen". The signature is written in a cursive style.

Lewis F. Larsen
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 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 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.

2010 Fellowship Program



2010 Selection Committee Rating Fellowship Applications.

2010 James Madison Fellows

The Foundation conducted its nineteenth nationwide competition for fellowships during 2010. 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 are the individuals who served as members of the 2010 Fellowship Selection Committee. They independently evaluated each application and recommended to the Foundation those who should be awarded James Madison Fellowships.

Dr. David Buckner
'99 James Madison Fellow
Assistant Professor
Oklahoma State University
Stillwater, OK

Mr. David J. Bobb
Director and Lecturer in Political Science
Department of History
Hillsdale College
Washington, DC

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. Idell Koury
'05 James Madison Fellow
Chair, History Department
Upper School, Southside Christian School
Spartanburg, SC

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

Dr. Jonathan O'Neill
Department of History
Georgia Southern University
Statesboro, GA

Dr. Patsy Ramsey
'95 James Madison Fellow
Instructor, Department of History
University of Central Arkansas
Conway, AR

2010 Fellowship Awardees

Current Teachers (Senior Fellows)

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

AK	Rachel M. Kohl	Kwethluk High School; Kwethluk, AK
AL	Benjamin R. Osborne	Vestavia Hills High School; Vestavia Hills, AL
AR	Martene L. Mourning	Episcopal Collegiate School; Little Rock, AR
AZ	Jaime R. Leverington	Red Mountain High School; Mesa, AZ
CA	Joseph S. Biron	Foothill High School; Bakersfield, CA
CA	Scott J. Bradley	Fred C. Beyer High School; Modesto, CA
CA	Dominic J. Caserta II	Santa Clara High School; Santa Clara, CA
CO	Joseph E. Collins	Ridgeview Classical School; Fort Collins, CO
CT	Jennifer C. Gembala	Canton Jr-Sr High School; Canton, CT
DC	Kurt J. Becker	Paul Public Charter School; Washington, DC
DE	Steven F. Byers	Louis L. Redding Middle School; Middletown, DE
FL	Michelle M. Hubenschmidt	Mulberry Senior High School; Mulberry, FL
FL	Jennifer A. Jolley	Marjory Stoneman Douglas High School; Parkland, FL
GA	Lauren M. Dworsky	Pauling County High School; Dallas, GA
HI	Elizabeth L. Baclayon	Chiefess Kamakahelei Middle School; Lihue, HI
IA	Charles C. Kannapel	East High School; Des Moines, IA
IL	David G. Elbaum	Adlai E. Stevenson High School; Lincolnshire, IL
IL	Kyle T. Hickman	Wheaton-Warrenville South High School; Wheaton, IL
IN	William L. Lorigan	Christian Academy of Indiana; New Albany, IN
KS	Donna R. Devlin	Smith Center Jr-Sr High School; Smith Center, KS
LA	John James North	Helen Cox High School; Harvey, LA
MA	Christine Chu	Framingham High School; Wellesley, MA
MD	Francis J. Eder	West Nottingham Academy; Colora, MD
MD	Tiferet Malka Reilly	Parkland Magnet Middle School; Rockville, MD
MI	Patricia Ann Gray	Fenton High School; Fenton, MI
MI	Michelle Dianne Holowicki	Brighton High School; Brighton, MI
MN	Heather Sue Loeschke	Cannon Falls Jr-Sr High School; Cannon Falls, MN
MO	Jacquelyn Suzanne Wamser	Mehlville Senior High School; Saint Louis, MO
MS	David Joel Pinnow	Lewisburg High School; Olive Branch, MS
NC	Tiffany R. Rhodes	Richlands High School; Richlands, NC
ND	Susan H. Reinhillier	Standing Rock Grant School; Fort Yates, ND
NJ	Stuart M. Wexler	Highstown High School; Highstown, NJ
NM	David J. Hill	Robertson High School; Las Vegas, NM
NM	Marisa Jamie Silva	Valley High School; Albuquerque, NM
NV	Keith Ivan Cooper	Moapa Valley High School; Overton, NV
NY	Amber McLain Quinn	Shenendehowa High School; Clifton Park, NY
OH	Jill D. Wise	Glen Oak High School; Canton, OH
OK	Pamela K. Duncan	Mustang Middle School; Mustang, OK
OK	Christina E. Gause	Cleveland Middle School; Tulsa, OK
OR	Alison L. Jessie	Fukuoka International School; Fukuoka, Japan
PA	Jason M. Todd	Charles Carroll High School; Philadelphia, PA
RI	James J. Betres Jr.	Portsmouth High School; Portsmouth, RI
SC	Brandi E. Cook	Marion High School; Marion, SC
TX	Patience D. LeBlanc	Liberty High School; Frisco, TX
TX	Margaret T. Wilkening	Lamar Consolidated High School; Rosenberg, TX
UT	Eric M. Wall	Copper Hills High School; West Jordan, UT

2010 Fellowship Awardees, cont.

VA	Melinda A. Sloan	Tabb High School; Yorktown, VA
WI	Michael L. Ellery	Nathan Hale High School; West Allis, WI
WV	James A. Wendt	Nitro High School; Nitro, WV
WY	Shawn M. Delaney	CY Junior High School; Casper, WY

Prospective Teachers (Junior Fellows)

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

KY	Mark L. Smith	University of Kentucky; Lexington, KY
ME	Derek B. Anderson	Colgate University; Hamilton, NY
NE	Trevor James Shalon	Peru State College; Peru, NE
NH	Adam D. Krauss	Suffolk University; Boston, MA
NJ	Timothy Charles McCall	Bates College; Lewiston, ME
TN	Rebecca M. Beard	University of Memphis; Memphis, TN
TX	Tracy M. Allen	University of Texas, Austin; Austin, TX
WA	Jason W. Schumman	University of North Carolina-Chapel Hill; Chapel Hill, NC

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

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

Mr. Hickman's fellowship, the McCormick Foundation-James Madison Fellowship, is funded by the McCormick Freedom Project of Chicago, Illinois.

Mr. Elder'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. Wexler'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. Silva's fellowship, The Hatton W. Sumners-James Madison Fellowship, is funded by The Hatton W. Sumners Foundation of Dallas, Texas.

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

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

Ms. Wilkening's fellowship, "The Fellow's Fellowship," is funded in part by contributions from current and alumni James Madison Fellows. A special acknowledgement for the funds received from the Major William Stevenson, Sr. Memorial Fund in honor of the late Major William Stevenson, Sr., '95 (TX).

Summer Institute on the Constitution



An exchange between the Fellows and the Trustees at the 2010 Board of Trustees Meeting.

The 2010 Summer Institute on the Constitution was held from June 19, 2010 to July 20, 2010. A total of 64 James Madison Fellows, representing nearly every state, attended the Institute. The Foundation invited two Cubans to join the Institute.

The Institute took place on the campus of Georgetown University and was the seventeenth 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. 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 Institute including working with the University on housing and food services. Additionally, the staff worked with individual Fellows in handling personal issues.



2010 Summer Institute lecture Being Given at George Washington's Mount Vernon Estate.

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. 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 2010 Institute. The academic program continues to be rigorous and challenging for the participants. Many collegial friendships were made among the Fellows.



Brittany J. MMoser, '09 (IN) and Gracieta S. Small '09 (MA) at Arlington National 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 has a Facebook page. The directory and the Facebook page help Fellows stay in touch with each other.

The Foundation maintains a dynamic website to help publicize the program and to communicate with James Madison Fellows. In 2010, the Foundation website underwent a major redesign to: www.jamesmadison.gov.



James Madison Symposium



Television and radio journalist, Cookie Roberts, speaking at the James Madison Symposium.

Cokie Roberts, award-winning author and journalist, was the featured speaker at the 2010 James Madison Symposium. Held on July 9, 2010 in the Copley Hall Formal Lounge at Georgetown University, the Symposium was attended by all Summer Institute participants, eighteen Fellows from various other classes, and members of the Foundation staff.

The first half of the symposium was a conversation between Roberts and Jamie Loo, Online Resources Producer for the McCormick Foundation Civics Program. Roberts read several passages from her recent work, *Ladies of Liberty*, and shared the joy and delight she experienced while reading the letters, diaries, and

memoirs of the women important in the lives of the second generation of Founders. Such primary sources reveal nuggets about the men of this generation but tell us volumes about the issues, concerns, and constraints of their wives and daughters. “We hear from these women on everything from politics to pregnancy and we see this period of history from their perspectives.”

The interview session was followed by a lively Q and A period, with attendees asking questions about political processes, education for women, and historical research. Roberts reminded her audience to preserve their own family records, including emails, so that future generations would have these primary sources to rely upon.

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 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 FY 2010, 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:

The Atlantic Foundation
Fairleigh S. Dickinson, Jr. Foundation, Inc.
Federal Employees Workplace Campaign
J. Willard and Alice S. Marriott Foundation
McCormick Freedom Museum Project
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, 2010, the Fund had assets of \$8,129,869.03.

James Madison Memorial Fellowship Foundation FY2010 (September 30, 2010)

THE JAMES MADISON MEMORIAL FELLOWSHIP FOUNDATION
TRUST FUND
BALANCE SHEET
As Of September 30, 2010 and 2009

	2010	2009
Assets:		
Intragovernmental		
Fund Balance With Treasury	\$ 2,136,521	\$ 2,056,846
Investments	\$ <u>37,095,711</u>	\$ <u>37,082,667</u>
Total Intra-governmental Assets	\$ <u>39,232,232</u>	\$ <u>39,139,513</u>
Accounts Receivable, net	\$ 310,786	\$ 305,918
Total Assets	\$ <u>39,543,018</u>	\$ <u>39,445,431</u>
Liabilities		
Intragovernmental		
Other	\$ 5,808	\$ 5,812
Total Intra-governmental Liabilities	\$ 5,808	\$ 5,812
Liabilities with the Public		
Accounts Payable	\$ 351,545	\$ 274,789
Other	\$ 107,108	\$ 84,470
Total Liabilities with the Public	\$ 458,653	\$ 359,259
Total Liabilities	\$ <u>464,461</u>	\$ <u>365,071</u>
Net Position		
Earmarked Funds	\$ 39,078,557	\$ 39,080,360
Total Net Position	\$ <u>39,078,557</u>	\$ <u>39,080,360</u>
Total Liabilities and Net Position	\$ <u>39,543,018</u>	\$ <u>39,445,431</u>

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, 2010 were \$8,129,869.03.

Governance



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



*Benjamin L. Cardin
U.S. Senator, MD*



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



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



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



*Drew R. McCoy
Clark University
Worcester, MA*



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

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. There are currently five vacancies on the Board.



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



*Joseph Manchin
Governor, WV*



*Arne Duncan
Secretary of Education
Ex Officio*



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

The Foundation extends its appreciation to Judge Diarmuid F. O'Scannlain and Governor Joseph Manchin (now Senator) for their service on the Board of Trustees as their terms have now expired.

On November 30, 2010, President Obama appointed Senator Benjamin L. Cardin to the Board of Trustees for a six year term.

James Madison Fellows



A group of Alumni Fellows waiting for Cokie Roberts to begin her talk at the 2010 James Madison Symposium held on the campus of Georgetown University.



Fellows enjoy a traditional "Virginia Fare" at the historic Michie Tavern near Monticello, VA.



Jason C. Beaver, '99 (OH), Eric D. Wierwille, '08 (OH) and Craig E. Uplinger, '09 (NJ) at Monticello.



Professor Herman Belz and Benjamin N. Knight, '09 (LA) in conversation at Monticello.



Fellows waiting for the private tour to begin at George Washington's Mount Vernon estate.

Foundation Staff

Lewis F. Larsen
President

Herman Belz
Director of Academics

Anne Marie Kanakkanatt
Special Assistant and Office Manager

Sheila Osbourne
Academic Assistant

Elizabeth G. Ray
Management and Program Analysis Officer

Claire Griffin
Director of Special Programs



Steve Weiss

The Foundation staff and Board of Trustees were saddened at the death in November 2010 of Steve Weiss, the Foundation's Director of Administration and Finance. Steve was a valued and beloved member of the Foundation staff for 11 years. Prior to joining the Foundation, Steve served in the U.S. Air Force and the U.S. Coast Guard. We have all—staff and fellows—benefited from Steve's great work. He is deeply missed.

Foundation's Washington, D.C. Office

2000 K Street, N.W., Suite 303
Washington, D.C. 20006
202-653-8700
202-653-6045 fax

General Inquiries

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

Foundation's Internet Address:

www.jamesmadison.gov

Fellowship applications are available online.