



2017 ANNUAL REPORT
Association of Marshall Scholars



BUCKINGHAM PALACE

I wish to extend my congratulations to the Association of Marshall Scholars, Harvard University and the German Marshall Fund on the occasion of the commemoration of the 70th anniversary of the Marshall Plan.

Secretary Marshall's Plan played a central role in Britain's post-war recovery and contributed greatly to peace, stability, and prosperity in Europe. I am pleased to learn that the British Government has announced an increase in funding to the scholarship that bears his name, to provide even more opportunities to talented young Americans to receive a British university education.

The vision of Secretary Marshall and of the United States lives on in the special relationship and strong bonds of friendship between our two nations and in their steadfast commitment to our common cause of freedom.

2nd June, 2017.

2017 ANNUAL REPORT

FROM THE EXECUTIVE DIRECTOR & PRESIDENT OF THE AMS

2017 marked the 70th Anniversary of the Marshall Plan. In 1947, General George Marshall called on America to demonstrate “a willingness on the part of our people to face up to the vast responsibility which history has clearly placed upon our country...” In 2017, this willingness was evident in the work of many within the Marshall Scholar community.

Throughout the year, the Association of Marshall Scholars (AMS) collaborated with alumni and the British Government to strengthen the Scholarship program, bring Scholars together and raise the profile of the Marshall community, as the community and the Scholarship program continue to have an important positive, public impact around the globe.

Thanks to the many individuals who contributed their time, resources, expertise and insights over this past year – **the AMS was able to celebrate an increase in UK government funding for the Scholarship, a boost in Marshall-related press and public visibility, expanded programming, and new digital initiatives.** The year’s success flows from the strategic planning work of preceding years, along with a comprehensive alumni survey that highlighted broad Marshall support for AMS initiatives that foster a sense of community and raise the visibility of the Scholarship program.

01. ENGAGEMENT

2017 saw increased Marshall Scholar engagement across key strategic initiatives of the AMS. Through this engagement, the AMS was able to deepen its organizational leadership and volunteer base, increase communications, build its programming and financial base of support, and further public diplomacy and visibility for the Marshall Scholarship program. **In December, the UK Embassy announced 43 Marshall Scholarships for 2018 through a further increase in Marshall Scholarship program funding, marking the second straight year that the government has expanded the number of students joining the scholarship program.**

This expansion represents a total 34% increase in scholarships offered since 2015. We are grateful for the untiring commitment of the Advisory Board and its chairman W. N. Harrell Smith, the AMS Board of Directors, the Scholarship Selection Committee Chairs, the MACC commissioners and chairs and so many others who have raised their voices in support of the Scholarship and its significant impact. The AMS received support from over 365 members, new donors and foundations; and benefited from over 270 Marshalls who volunteered time, counsel, leadership and ideas as advisors, directors, officers, regional events coordinators,

34%
INCREASE
IN FUNDED
SCHOLARSHIPS
SINCE 2015

outreach volunteers, selection and application reading committee members, communications and partnership support.

02. PROGRAMMING

In 2017, the AMS hosted 19 events across the country, including the Harvard Marshall Forum, and garnered participation by roughly 1,000 Marshall Scholar attendees and other guests. Events were held in New York, Washington, Boston, and San Francisco and included collaborations with the Soros Foundation, School of American Ballet and the Royal Ballet School, Neuehouse, Harvard University, The German Marshall Fund, the British Embassy and British Consulates in several regions.

Forum programming featured distinguished guests and Marshall Scholars including: Madeleine Albright, former U.S. Secretary of State; Danielle Allen (1993), University Professor, Harvard; Graham Allison (1962), Director, Belfer Center, Harvard Kennedy School; Baroness Valerie Amos, Director, School of Oriental & African Studies, Univ. of London; Brian Atwood, former Administrator for USAID; Daniel Baer (2001), former Ambassador to the Organization for Security and Cooperation in Europe; Dan Barouch (1993), Harvard Medical School; Daniel

Gorsuch Rejects Doubts Over 'Rule of Law Today'



Justice Neil M. Gorsuch, left, and Justice Stephen G. Breyer at the Harvard Marshall Forum on Friday in Cambridge, Mass. Russ Campbell

Photo credit: New York Times (June 3, 2017)

Benjamin (1983), Director, John Sloan Dickey Center, Dartmouth College; Stephen Breyer (1959), US Supreme Court Justice; Bill Burns (1978), President, Carnegie Endowment for International Peace; Sewell Chan (1998), *New York Times* International News Editor; Heidi Crebo-Rediker, CEO International Capital Strategies; Kim Darroch, Her Majesty's Ambassador to the United States; Karen Donfried, President, German Marshall Fund; Neil Gorsuch (1992), US Supreme Court Justice; Jane Harmen, President Woodrow Wilson Center; Joichi Ito, Director MIT Media Lab; Bert Koenders, Dutch Minister of Foreign Affairs; Frederick Logevall, Laurence D. Belfer Professor of Intl Affairs, Harvard Kennedy School; Douglas Melton (1975), Harvard University; Martha Minow, Dean, Harvard Law School; Peter Orszag (1991), Managing Director & Vice Chair of Investment Banking, Lazard; Stephen Pomper, former National Security Council Sr Director for African Affairs, Multilateral

Affairs and Human Rights; Malcolm Rifkind, former UK Secretary of State for Foreign and Commonwealth Affairs; Benn Steil, Director, International Economics, Council on Foreign Relations; Kathleen Sullivan (1976), former Dean, Stanford Law School; and performances by The Silk Road Ensemble and 2017 Marshall Scholar Reylon Yount.

Marshall Medals were awarded to Secretary Madeleine Albright, Ambassador Matthew Barzun, William Janeway (1965), and Nancy Cox (1970) for their contributions to US-UK understanding, leadership in public life, and creative energies reflecting the legacy of George C. Marshall. The Forum Host Committee included Marshall Scholars: Doug Melton (1975), Dan Barouch (1993), Jeannie Suk Gerson (1995), Eric Nelson (1999), Graham Allison (1962), Nannerl Keohane (1961),

Michael Klarman (1984) and Michael Sulmeyer (2004); Dean of Harvard Law School, Martha Minow and Dean of Harvard College, Rakesh Khurana; and the British Consul General to New England, Harriet Cross.

Regional and partner programming continued throughout the year, and included conversations with Marshall Scholars Tom Friedman (1975), Julie Suk (1997), Aroop Mukharji (2010), Esther Freeman (2002), Josh Bennett (2010), as well as social gatherings and opportunities to experience the arts, musical performances and film screenings such as a celebration of the 50th Anniversary of Sgt Pepper by the Beatles in collaboration with the UK Consul General in New York, and an evening of discussion and performance by the young dancers who took part in the annual exchange program of the Royal Ballet School and American Ballet Theatre Studio Company.

In addition to regional, annual and partner events, the AMS continued to support a small selection of current scholar activities organized by the current classes – such as Thanksgiving dinner, and a retreat to the Burn in Glen Esk, Scotland. Finally, the AMS established a standing committee with representatives from the MACC, British Embassy, Marshall Selection Committee, the AMS, as well as recent and current Scholars, in order to coordinate all outreach and diversity efforts for the Scholarship.

03. COMMUNICATIONS

Thanks to the support of partners and participants, the **2017 Harvard Marshall Forum** received **over 1.2 million coverage views, with press from over 40 major newspapers and media outlets (such as the Wall Street Journal, New York Times, Washington Post, and Associated Press, among others)**. The event was trending #1 on Twitter for the Boston region on Saturday, June 2, 2017, and the *New York Times* featured a significant print article on Sunday, June 3, 2017.

The Winter AMS Newsletter featured highlights from the Harvard Marshall Forum as well as a reprint of the special letter from HM Queen Elizabeth II addressed to the AMS, Harvard University, and German Marshall Fund on the commemoration of the 70th Anniversary of the Marshall Plan. The AMS is grateful to Nick Hartman (2003) and Ushma Neill (1999) for their past leadership of the AMS Alumni Newsletter and welcomes Stanley Chang (1991), as the new Managing Editor of the alumni newsletter.

“Scholars in the News,” an e-bulletin begun in 2016, was issued periodically as a compliment to the Newsletter, in order to spotlight the work and accomplishments of Marshalls recently in the media. Issue 4 was dedicated to “literary super agent” Ed Victor CBE (1961) and featured three scholars – Yopie Prins (1981), Ben Buchanan (2013), and Margot Singer (1984) – with new publications. Issue 3 highlighted recent news articles by Marshall Scholar journalists: Pulitzer Prize winner Jeffrey Gettleman (1994), NYT International News Editor Sewell Chan (1998), and East Asia Analyst Sarah Cook (2005). The new AMS website, developed under the guidance of Michael Li (2007) and Phil Mui (1995), was launched in June, and has already had over 50,000 unique page views. The website offers a calendar of events, AMS news and a private, searchable digital directory for Marshall Scholars, where alumni can update their contact information and settings. In November, the AMS launched its first targeted social media campaign #ImAMarshall, to compliment the UK Embassy “BeAMarshall” and current Scholars’ “MarshallMonday” campaigns on Twitter.



Twitter Post from March 23, 2017

In December, the AMS worked closely with the UK Embassy and alumni on the 2018 Marshall Scholars announcement by the British Government, which ran as an exclusive on the Associated Press and was picked up by over 100 press outlets (national, regional, international) and garnered millions of digital impressions. This was the first time since 1999 that the New York Times ran the full list of Marshall Scholar names. Additional mainstream media, such as the *Washington Post*, ABC News, the *Miami Herald*, and the *Seattle Times*, and a large number of local and regional papers, University papers and international news, media, and radio covered the story.

04. FUNDING

In 2017, the AMS raised \$2.8M in pledges and cash donations and obtained its highest donor participation rate (~20%) in the organization's history. 38 class fundraisers helped spur a 26% increase in participation among Marshall membership. In 2016, the AMS established a Marshall Scholars Foundation to support new initiatives that engage Marshalls Scholars to benefit the public, strengthen US-UK ties, and bolster the scholarship program for the 21st Century. In the spring of 2017, the AMS launched the Marshall Challenge campaign to support these efforts. Through the support of its members, new donors and foundations, the AMS, by Year End 2017, raised \$1.2M (80%) of its \$1.5M goal and has until Year End 2018 to garner the final 20% or \$0.3M.

Finally, the AMS launched a \$1.2M Scholarship Endowment to support one Marshall Scholarship in perpetuity. The Endowment Fund is a symbolic gesture of gratitude towards Her Majesty's government from Marshall Scholars. More than two hundred alumni from the classes of 1954 to 2015 donated to the Marshall Scholarship Endowment. Reid Hoffman (1990) matched each of these gifts dollar for dollar. In addition, several alumni are supporting Marshall Scholarships directly at their respective almas mater (Sussex University; Magdalene College, Cambridge; Lincoln College, Oxford; Emmanuel College, Cambridge). Through coordination with the AMS, the MACC, and the aforementioned Colleges, these alumni have pledged over half-a-million dollars toward Marshall Scholarships at these schools.

05. FUTURE

Looking ahead to 2018-2019, the AMS aims to surpass its \$1.5M target for "The Marshall Challenge" – building a solid financial foundation from which to develop new initiatives that strengthen US-UK ties, the Marshall community and the Scholarship program. Every donation made to this campaign before the end of 2018, will be generously matched dollar for dollar by Reid Hoffman (1990). The Marshall Challenge will help support new initiatives that include: a biennial Marshall Forum that will bring together British and American leaders and Marshall Scholars from public, private, and non-profit sectors; a Marshall Digital Video pilot series; an enhanced digital directory; a plethora of programming and opportunities across the Marshall Scholar network to further US-UK exchange.

We are grateful to all of you who, over the past year, shared time, ideas and valuable resources to contribute to the community of Marshall Scholars, the Scholarship program and US UK understanding. We welcome everyone's engagement and participation in 2018.

Thank you.

Nell Breyer, *Executive Director*
ASSOCIATION OF MARSHALL SCHOLARS

Andrew Klaber, *President*
ASSOCIATION OF MARSHALL SCHOLARS

2017 FINANCIAL STATEMENTS & LEADERSHIP

Statement of Activities, January 1 – December 31, 2017

| | | Endowment (2) | Operations | TOTAL |
|-----------------------|--------------------------------------|---------------|------------|--------------|
| Revenue | | | | |
| | Donations & Registration Fees | \$ 408,675 | \$ 965,056 | \$ 1,373,731 |
| | Investment Income | \$ 159,838 | \$ - | \$ - |
| Total Revenue | | \$ 568,513 | \$ 965,056 | \$ 1,533,569 |
| Expenses | | | | |
| | All Operating & Scholarship Expenses | \$ - | \$ 615,625 | \$ 615,625 |
| Total Expenses | | \$ - | \$ 615,625 | \$ 615,625 |
| Net Income | | \$ 568,513 | \$ 349,431 | \$ 917,944 |

Balance Sheet, as of December 31, 2017

| | | Endowment (2) | Operations | TOTAL |
|-------------------------------------|------------------------------------|---------------|------------|--------------|
| Assets | | | | |
| | Cash and Cash Equivalents | \$ - | \$ 733,666 | \$ 733,666 |
| | Other Current Assets (investments) | \$ - | \$ 28,451 | \$ 28,451 |
| Total Assets | | \$ 1,255,641 | \$ 762,117 | \$ 2,017,758 |
| Liabilities and Equity | | | | |
| | Current Liabilities | \$ - | \$ 16,162 | \$ 16,162 |
| | Non-current Liabilities | \$ - | \$ - | \$ - |
| | Equity (Fund Balance) | \$ 1,255,641 | \$ 745,955 | \$ 2,001,596 |
| Total Liabilities and Equity | | \$ 1,255,641 | \$ 762,117 | \$ 2,017,758 |

NOTES TO FINANCIAL STATEMENTS

(1) The financial statements above are unaudited. The AMS undergoes an annual audit in accordance with Massachusetts' law governing not-for-profit organizations. The audit of our 2017 financials will be completed in Q3 2018. 2016 audited financials are available upon request. (2) "Endowment" refers to the AMS Marshall Scholarship endowment, which is designated as a fund to support a Marshall Scholarship in perpetuity.

AMS BOARD AND LEADERSHIP

AS OF DECEMBER 31, 2017

| | |
|---------------------------|-------------------------|
| PRESIDENT | Andrew Klaber |
| VICE PRESIDENT | Lauren Baer |
| TREASURER | Josh Goldman |
| COMMUNICATIONS DIRECTOR | Zachary D. Kaufman |
| SECRETARY | Nell Breyer |
| CLERK | William H. Coquilllette |
| DIRECTOR, BRITISH AFFAIRS | Ted Leinbaugh |
| CO-DIRECTOR, PROGRAMS | Emma Wu Dowd |
| CO-DIRECTOR, PROGRAMS | Betsy Scherzer |

ADVISORY BOARD

Graham Allison, Anne Applebaum, Bruce Babbitt, Stephen Breyer, William J. Burns, Kurt Campbell, Thomas Everhart, Keith Griffin, William Janeway, CBE, Nannerl Overholser Keohane, Harold Koh, Douglas Melton, Peter Orszag, W. N. Harrell Smith, Edward Stolper, Kathleen Sullivan, Daniel Yergin

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Lauren Baer, Peter Barack, Martin Budd, Ben Carmichael, Saj Cherian, Isobel Coleman, William H. Coquilllette, Jeff Gell, Martin Gilkes, Josh Goldman, Scott Grinsell, Linn Hobbs OBE, Parker Hudson, Ted Kamman, Zachary D. Kaufman, Bob Kyle, Ted Leinbaugh OBE, Michael Li, Betsy Scherzer, Meena Seshamani, Margot Singer, Len Srnka

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W. N. Harrell Smith (*AMS Advisory Board Chair*), Jeffrey Rosensweig (*Atlanta Selection Chair*), Craig Schiffries (*DC Selection Chair*), Katie Clark (*Los Angeles Selection Chair*), Jacob Chacko (*San Francisco Selection Chair*), Adam Mortara (*Chicago Selection Chair*), Joanna Lau (*Boston Selection Chair*), Dianne Flynn (*New York Selection Chair*), Mary Edgerton (*Houston Selection Chair*)

HONORARY PATRON

His Royal Highness, the Prince of Wales

Thank you

TO OUR MANY GENEROUS DONORS WHO
MAKE THE ACTIVITIES OF THE AMS POSSIBLE

GUARANTOR (\$50,000 AND OVER)

The German Marshall Fund
Joan Gillings
David Golub (1983)
Reid Hoffman (1990)
Leland Foundation
Adam Mortara (1996)
Song Tan (1985)

SPONSOR (FROM \$15,001 TO \$50,000)

Anonymous
Peter Barack (1965)
The British Schools and
Universities Foundation
William Janeway CBE (1965)
Frank Trumbower (1959)
Douglas Kruse (1972)

LEADERSHIP CIRCLE (FROM \$5,001 TO \$15,000)

Martin Budd (1960)
Robert Gray OBE (1971)

PATRON (FROM \$1,501 TO \$5,000)

Sandra Babcock-Lumish
William Coquillette (1971)
Angela Duckworth (1994)
Edward Kamman (1985)
Andrew Klaber (2004)
Jeffrey Gell (1997)
Mark Matovich (1963)
Leonard Srnka (1968)

FRIENDS (FROM \$1 TO \$1,500)

Anonymous
Kevin Benson (1990)
Rakesh Bhala (1984)
Alyssa Bilinski (2014)
Stephen Black (1968)
Stephen Breyer (1959)
Julius Bright Ross (2017)
Benjamin Buchanan (2013)
Richard Burney (1991)
Janet Burroway (1958)
William Butler (1963)
David Campbell (1960)
Michael Campbell (2010)
Benjamin Carmichael (2008)
Stanley Chang (1991)
Christina Chang (2012)
Samuel Charap (2003)
Lyric Chen (2007)
Saj Cherian (1997)
Claire Clelland (2006)
Anne Cocos (2005)
Rhaina Cohen (2014)
Patricia Conrad (1980)
Christopher Counts (2013)
Mitchell Crusto (1977)
Dahlia D'Arge (2015)
Rhiju Das (1998)
Benjamin Daus-Haberle (2015)
Katelyn Davidson (2013)
Eleanor Dickey (1989)
Patrick Donnan (2014)
Edmund Downie (2015)
Julia Ebert (2015)
Kyle Edwards (2012)
Andrew Ehrich (2010)
Neir Eshel (2007)
Vincent Evans (2005)
Elizabeth Evenson (1999)
Richard Falkenrath (1991)
Steven Farmer (1994)
Rebecca Farnum (2012)
Anna Feuer (2011)
Kathleen Fickle (1974)
Richard Fiddler (1958)
D. Cameron Findlay (1982)
Diane Flynn
Christopher Forman (1983)
Steven Fredrickson (1992)
Antonia Fried (1987)
Julia Gaiser (1962)
Thomas Gaiser (1962)
Stephen Garvey (1987)
Lev Gelb (1992)
Joshua Geltzer (2005)
David Ginger, Jr. (1997)
Andrew Golding (1982)
Joshua Goldman (2002)
Bartholomew Goldyn (1994)
Mauricio Gonzalez (1978)
Theodore Gorton (1970)
Madeline Grade (2012)
Amy Greenfield (1991)
Scott Grinsell (2004)
Adam Grogg (2004)
Chris Gronning (1977)
Stephen Gudeman (1961)
Scott Gwara (1984)
Elizabeth Harmer Dionne (1992)
Rachel Harmon (1991)
Nicholas Hartman (2003)
Benjamin Heineke (2002)
William Henagan (2017)
Anthony Hendricks (2007)
Patrick Henry (1960)
John Hewko (1979)
Caroline Hibbard (1964)
Jessica Hohman (2006)
Dallas Holmes (1962)
Theodore Hong (1995)
Thomas Horton (1982)
Andrea Howard (2015)
Parker Hudson (1968)
Bryan Huey (2000)
Gary Hufbauer (1960)
Katherine Hunt (1975)
Erin Hylton (2014)
Dhananjay Jagannathan (2009)
Alison Jenkins (1995)
Arthur Johnson (1974)
Richard Johnston (1999)
Robert Jones (1961)
Emily Kapur (2010)
Zachary Kaufman (2002)
Wallace Kaufman (1961)
Judd Kennedy (2008)
Nannerl Keohane (1961)
Muhammad Khan (2016)
Kent Killelea (1979)
Thomas Killian (1991)
Daniel Kinch (2017)
Stephen Klaber
Benjamin Kleinman-Green (1996)
Daniel Klessig (1971)
Harold Koh (1975)
Miriam Krieger (2004)
Timothy Krysiak (2005)
Manon Kumler
Jeffrey Kunz (1971)
Steven Kussick (1983)
Melissa Lane (1989)
Jessica Lanney (2010)
Bryan Leach (2000)
Carol Lee (1976)
Jessica Lee (2005)
Theodore Leinbaugh OBE (1975)
Caroline Levine (1992)
Elizabeth Lewis-Pardoe (1992)
Abbie Liel (2002)
Satu Limaye (1986)
Matthew Linsley (2008)
Christy Lorgen (1992)
Colleen Loynachan (2014)
Jingyuan Luo (2011)
Seth & Suzette Masters (1981)
Kimberly Marshall (1982)
Matthew McBrady (1992)
David McCrary (2002)
Katherine McDaniel (2015)
Patricia McGrath (1973)
Austin McKinney (2010)
Mellon Foundation Matching Gifts
Program David Mengel (1993)
Terry Miller (1965)
Frederic Miller (1974)
Michele Moody-Adams (1978)
David Morgan (1960)
David Newkirk (1974)
Samantha Olyha (2014)
Omidyar Foundation
Peter Orszag (1991)
Daniel Ortiz (1978)
Alexander Oshmyansky (2005)
Norman Owen (1964)
James Ozment (2002)
Daniel Pastor (2004)
Alan Petersburg (1981)
Thuy Phung (1989)
Todd Pierce (1989)
Daniel Plaine (1965)
Michael Poll (2012)
James Poterba (1980)
Lois Potter (1961)
Lisa Pruitt (1989)
Matthew Quallen (2016)
Anna Quider (2007)
Julia Rafal-Baer (2006)
Sujit Raman (2000)
Leah Rand (2012)
Rahul Rao (1994)
Victoria Razin (2013)

Rahul Rekhi (2013)
Jeffrey Rhodes (1987)
Gregory Richardson (1981)
David Rikert (1967)
David Roberts (1999)
Steven Robinette (2010)
Skyler Ross (2016)
Daniel Rowland (1963)
Lea Ruscio (1999)
Sophie Rutenbar (2007)
Marcus Ryu (1995)
Matthew Saal (1988)
Warwick Sabin (1998)
Betsy Scherzer (2007)
Emma Schmidgall (2007)
Stephen Schneider (1956)
Bryan Schwartz (1983)
Maia Schweizer (2004)
Joseph Seliga (1995)
Matthew Sellers (2012)
Meena Seshamani (1999)
Kannon Shanmugam (1993)
Joseph Shapiro (2005)
Carla Shatz (1969)
Emily Shearer (2014)
Shell Oil Company Foundation
Douglas Shier (1968)
Loren Siebert (1993)
Margot Singer (1984)
Kirin Sinha (2014)
Jeremy Smith (2011)
Craig Snyder (1995)
Paul Sonne (2007)
Doug Spaniol (1992)
A. Benjamin Spencer (1996)
James Stasheff (1958)
Will Stoeckle (2012)
Edward Stolper (1974)
Robert Stoothoff (1957)
Kelly Storrs (2009)
Michael Sulmeyer (2004)
Richard Swanson (1972)
Tracey Tomlinson (1994)
Brittany Tompkins (2013)
Michael Tomz (1992)
Alar Toomre (1957)
Terry Totemeier (1991)
Megan Towle (2007)
James Trefil (1960)
Charles Trickey (2002)
William Tsutsui (1985)
Garrett Turner (2012)
Richard Tyner (1970)
Benjamin Umans (2011)
Milada Vachudova (1991)
Bryan Vadheim (2013)
Benjamin Van Doren (2016)
Marisa Van Saanen (2002)
Nathaniel Van Valkenburgh
(2003) Viktorya Vilks (2008)
Patrick Villani (1963)
Jordan Wales (2001)
Rebecca Walkowitz (1992)
Michele Walsh (1985)
Bradford Walters (1973)
Ashley Warren
Daniel Weeks (2006)
Albert Wells, Jr. (1978)
Matthew Werdegarr (1992)
Nicholas Werle (2013)
James Wesner (1961)
Ashley White (2005)
Jesse White, Jr. (1966)
Matthew Wikander (1990)
Michael Wilkerson (2010)
Tracy Williams (2004)
Susanne Wofford (1973)
Thomas Wolf (2005)
Paul Woodruff (1965)
Deborah Yaffe (1987)
Zain Yoonas (2008)
Grace Young (2014)
Yun Yu (2009)



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