THE GERMAN MARSHALL FUND OF THE UNITED STATES TRIENNIAL TRANSATLANTIC LEADERS RETREAT

"TRANSATLANTIC 20/20: PREPARING FOR A NEW ERA"

April 7-9, St. Vincent, Italy

Action Plan for GMF's Alumni Engagement, 2017-2020







EXECUTIVE SUMMARY

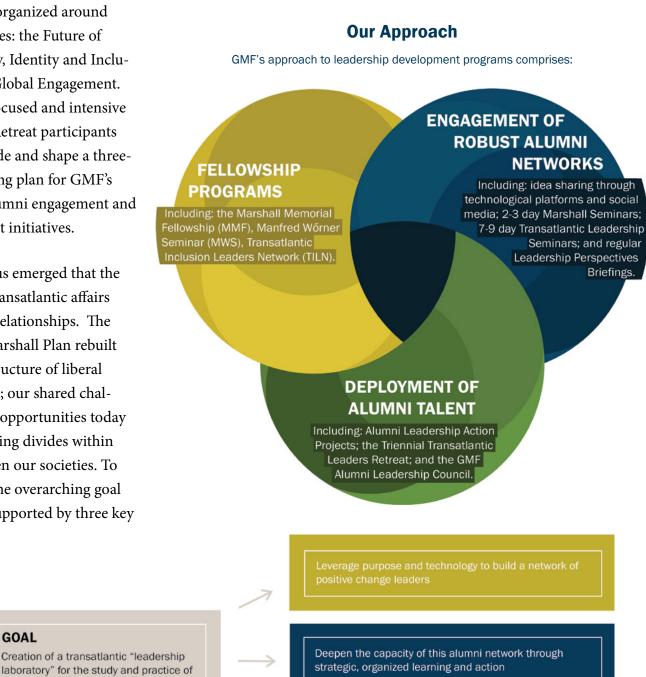
On the eve of the 70th anniversary of the Marshall Plan, GMF's inaugural Triennial Transatlantic Leaders Retreat, "Transatlantic 20/20: Preparing for a New Era", brought together 150 GMF leadership program alumni and stakeholders to identify upcoming challenges for the transatlantic relationship and define priorities for a new era of transatlantic action. Participants exchanged ideas, strategies, and engaged in practical and tactical planning

for action organized around three themes: the Future of Democracy, Identity and Inclusion, and Global Engagement. Through focused and intensive dialogue, Retreat participants helped guide and shape a threeyear working plan for GMF's existing alumni engagement and deployment initiatives.

A consensus emerged that the future of transatlantic affairs rests with relationships. The original Marshall Plan rebuilt the infrastructure of liberal democracy; our shared challenges and opportunities today lie in bridging divides within and between our societies. To this end, one overarching goal emerged supported by three key objectives.

GOAL

effective leadership.



Create an annual fund campaign through the Alumni Leadership Council to capitalize these goals and grow the network's reach across Europe and the United States.

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Introduction

June 2017 marks the 70th anniversary of the Marshall Plan.

Where the original Marshall Plan rebuilt the foundation of liberal democracy, the challenge and opportunity we face now is strengthening the networks of people that bind liberal democracies together.

In the spirit of this historic milestone, GMF's inaugural Triennial Transatlantic Leaders Retreat, "Transatlantic 20/20: Preparing for a New Era" in Saint-Vincent, Italy, April 7-9, 2017, provided a new format and opportunity for 150 GMF leadership program alumni and stakeholders to identify upcoming challenges for the transatlantic relationship and define priorities for a new era of transatlantic action through a dynamic exchange of ideas, strategies, and most importantly practical and tactical planning for action. As a result of the Retreat, GMF alumni will embark on a three-year work plan guided by the values of the Marshall Plan, specifically focused on building and strengthening relationships among leaders on both sides of the Atlantic.



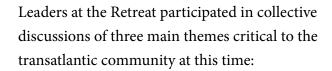
Looking back can sometimes help us see the present more clearly. The Marshall Plan laid the foundation for both a strong transatlantic relationship and a unifying Europe that we have come to take for granted over the ensuing 70 years. We forget how contentious the Marshall Plan was back in 1947. We forget that U.S. officials had to spread out across the country to make the case for the Plan to warweary Americans, who wanted to focus inward, rather than provide substantial support to help a devastated Europe recover. Today, the leadership network you are a part of because of GMF's investment has a crucial role to play in articulating the relevance of sustained transatlantic ties to our time. Each of us has agency in this and our ability to affect change is multiplied when we work together. Let's commit to act in concert on the set of priorities that come out of this retreat.

"

"Our network of 3,000 leaders is poised to guide transatlantic relations through this crucial testing period. In the spirit of the liberal values that bind transatlantic partners together, we welcome dialogue with all those who support freedom of expression, of movement, and of trade. We

will not condone exclusionary policies or incendiary speech and actions. You have GMF's commitment of support as you leave this Retreat to lead in your communities and sectors."

- Kevin Cottrell (MMF '08), Director, Transatlantic Leadership Initiatives, The German Marshall Fund of the United States



- the Future of Democracy;
- Identity and Inclusion;
- ➤ Global Engagement.

Highlights of the discussions in these areas are provided from pages 7-13, along with key insights shared by leaders present on each topic. The full list of participants who contributed to these dialogues is available on page 24. After each dialogue session, participants broke into small groups of 10 to move from ideas to action and devise tactical recommendations to guide GMF's alumni leadership work over the coming three years. We are pleased to share these recommendations with you on pages 14-22, concluding on page 23 with information about how you can play your part in leading the transatlantic relationship into a new era.



RETREAT DIALOGUE AND ACTION PLANNING

Future of Democracy

Recent populist developments highlight vulnerabilities in our democracies. Europe and the United States have experienced increased mobilization on the far-right and the far-left. Similar attributes characterize both extremes including strong leadership, opposition to elites, and calls for different distributions of rights and wealth. At the same time, technology has continued to transform the way we identify and debate public issues, and organize. Our societies have become more diverse, complex, and fragmented with coalitions becoming more fluid. The pace of change has left many disoriented, struggling to come to terms with the new realities and engage in effective decision making. Innovation has become essential for civic values and democratic institutions to flourish in this ongoing transition and continue to serve our societies into the future.



"Democracy is today under assault directly and indirectly. Leaders of a variety of nationalist and populist movements around the world are positing that certain democratic values are not compatible with strength and leadership – that there is such a thing as 'illiberal' democracy. This is our moment to step forward and to defend the liberal democratic order, the rule of law, freedom of speech, political rights and liberties, in order to advance them and strengthen them. Democracy has never been given to anyone on a silver plate. It needs to be invented and reinvented and defended by society and citizens every day."

- Ivan Vejvoda, Permanent Fellow, Institute for Human Sciences



"Democracy might not be the best system in the world, but it provides us with alternatives when current public policies stop having the desired effects. Recent attempts to undermine the fundamentals of democracy with attacks on freedom of thought, judiciary, and media put us all at risk, losing our ability to innovate new solutions for the challenges we face. Fortunately, the desire to preserve democratic systems is strong, and new technologies afford us with opportunities to self-organize and form alliances in entirely new ways."

- FILIP VOJVODIC MEDIC, SENIOR PROGRAM OFFICER,
THE GERMAN MARSHALL FUND OF THE UNITED STATES

It's not that people feel left behind — it's that **people** <u>are</u> left behind.

OANA TOIU (MMF '14),
 FORMER SECRETARY OF STATE,
 ROMANIA

Is 'populism' just a euphemism for majoritarian fear of 'the Other'?

- CHRIS RABB (MMF '11), STATE REPRESENTATIVE, PENNSYLVANIA, U.S. No politics is local any longer.

— ZSUZSANNA SZELENYI (MMF '93), MEMBER OF PARLIAMENT, HUNGARY If we do not care that populists get the credit, we can engage them and help them change.

—ALI ERCAN ÖZGÜR (MMF '09), PRESIDENT, IDEMA, TURKEY

In politics, **truth is a difficult path**. You have to be a role model yourself.

- CHRISTINA MANOLOPOULOU (MMF '08), LAWYER, GREECE

Now, as ever, we must be **evangelists for liberal democracy** and all it represents. I am honored to walk beside each of you, to learn from you and support each other in our work—individual and collective.

— JEN ALGIRE (MMF '09), PRESIDENT, GREATER CLARK FOUNDATION, KENTUCKY, U.S.

Identity and Inclusion

The need for diverse and inclusive leadership has become even more urgent, as Europe and the United States work to strengthen social cohesion and to leverage the innovation and creativity of diverse and inclusive teams for success in a global economy. On both sides of the Atlantic, we continue to witness tragic events that underscore the need to reverse the trends of fragmentation in our societies. A variety of polling data indicates a heightened period of tension across such diversity factors as race, faith, and ethnicity, despite prior advances in legislation and innovations in the practice of leadership. At the same time, new possibilities for organizing and communication, as well as the urgency of the times, are causing a renaissance in terms of activism and commitment to inclusive societies.

"E

"Diverse and inclusive policies lead to a strong return on

investment. The clear return that Meridiam has gained over the years with our focus on inclusive leadership is great recognition from our peers, institutional investors and the public sector in all the countries where we operate."

- THIERRY DÉAU, FOUNDING PARTNER, CEO, MERIDIAM INTERNATIONAL



The inclusive leadership competency empowers leaders across sectors to access the full potential in our societies to address such pressing issues as refugee and immigration flows, inequity across regions and diversity factors, and imbalances regarding security.

"GMF considers the case definitive: diverse and inclusive leadership is the way forward for transatlantic partners.

We aim to deepen knowledge in this field, and to widen the

practice of inclusive leadership across generations, sectors, and borders."

Lora Berg, Senior Fellow,
 The German Marshall Fund of the United States



Inclusive security is crucial. When leaving people out, we see people looking for extreme and dangerous ways to feel secure and recognized. Just look around on the streets, and the visible protection measures you see are already the proof of it. We can learn from each other across the Atlantic to rapidly enhance Inclusion in the security sector.

— SAMIRA RAFAELA (TILN '16), STRATEGIST, DUTCH POLICE, THE NETHERLANDS

The question is not how do we integrate migrants—rather, how do we make sure our political and economic structures ensure basic human rights to everyone.

— CLAUDIO TOCCHI,

COMMUNICATION OFFICER AND

POLICY ADVISOR, CITY OF TURIN, ITALY

Too often government, NGOs, and civil society think about disability later, but **disability should not be an afterthought**. The reality is, we will not solve the problems of your society if we do not address disability. People with disabilities need to have a place at the table.

— KERRY THOMPSON (MMF '14), INFORMATION AND PROGRAM COORDINATOR, DISABILITY RIGHTS FUND, MASSACHUSETTS, U.S.

In order to have a greater inclusive impact, we have to **engage with people** who are different, listen and connect.

— MPANZU BAMENGA (TILN '15), CITY COUNCIL MEMBER, MUNICIPALITY OF EINDHOVEN, THE NETHERLANDS



Global Engagement

As many of our societies turn increasingly inward, the need for global engagement has never been more imperative. There is growing concern for the future of U.S. global leadership both at home and abroad, and the recent Brexit vote makes apparent the critical challenges facing the European Union and international community. Mounting skepticism of the importance of trade and international relations and resistance to immigration and inclusion continue to fuel inward, isolationist thinking by the public and their representatives. These factors — on their own or in combination — demonstrate the increasing need to invest in leaders and ensure their global outlook. Elected leaders at all levels need to understand and translate these global trends for their local constituencies now more than ever before. GMF's Transatlantic Leadership Initiatives team has pioneered innovative programs and powerful curricula to help leaders expand their global professional networks; gain access to GMF's policy expertise; and think, engage, and act at the international level. Leaders in the GMF network have responded in kind, making deeper commitments to strengthen and build global engagement capacities over the years to come.

"The innovative company must define and solve problems from a customer-centric point-of-view in order to create engaged ecosystems that nurture innovation. Encouraging a globally minded and innovative culture requires defining a strategy that encompasses business, Nongovernmental organization, education, government, and civil society. We need to make sure that the people who are going to be the future are

ready for the future. You need to engage locally and globally. Once you engage locally, it's your step to engage globally."

 Janet Lamkin,
 President of the Bank of America in California, U.S.





"The older paradigm of international engagement casts nation states as the leaders. Alongside this **a new reality is** rapidly developing, with subnational leaders — elected officials, business leaders, Nongovernmental organizations — reaching out across borders and forging global ties. Even if your country is turning inwards, every leader in this room is an agent for global engagement."

Megan Doherty, Transatlantic Fellow,
 The German Marshall Fund of the United States

The role of non-profits like Barcelona Global is to build networks of professionals from different backgrounds and sectors who are highly committed to making their city more globally engaged. Our goal is to connect international talent in our city — researchers, innovators and professionals — with members of the local community, in order to foster greater global ties.

— MATEU HERNÁNDEZ (MMF '06), CEO, BARCELONA GLOBAL, BARCELONA, SPAIN

My experience as a GMF fellow has been a gift, but now it's important to use this network as a mechanism to **connect my local network to the globe**.

- KIRK MAYES (MMF '13), CEO FORGOTTEN HARVEST, MICHIGAN, U.S.

Get out of your bubble: **think big**, act local, and engage global.

— AHMED LAROUZ (MMF '08), CEO BRIDGIZZ, AMSTERDAM, THE NETHERLANDS It's less the global network, and more the local ecosystem with an international perspective and a sense of belonging that can foster global engagement.

— CHRISTINE SPERNBAUER (MMF '17), PROGRAM DIRECTOR, IMPACT HUB VIENNA, AUSTRIA

This is global leadership. See an idea in Denmark. **Take it home**. **Make it better**. Then run around and help Ukraine. Thank you John Boerstler and the Combined Arms team [2017 Marshall Prize Winner for best Alumni Leadership Action Project] for helping veterans worldwide.

— BENJAMIN HERNANDEZ (MMF '17), CFO, HOUSTON HEALTH DEPARTMENT, TEXAS, U.S.

THE PLAN FORWARD: A New Era for Transatlantic Relationships

GMF is pleased to share the overall goal and key objectives for collaborative alumni action that emerged from the three thematic dialogue and alumni-led brainstorming sessions at the Retreat.

Summary of Goal and Objectives:

One overarching goal emerged from the Retreat: the consolidation a transatlantic "leadership laboratory" for the study and practice of effective leadership that is fueled by engaged program alumni.

Building on recent growth and engagement of the GMF alumni network, GMF will further grow a virtual leadership laboratory to provide a learning environment to solve real leadership problems, incubate new ideas, and to discover talent. Alumni will pursue these topics through GMF seminars, their own leadership action using mini-grant awards, and through expanded opportunities to contribute to GMF's thought leadership. Efforts will include expansion and improvement of research and analysis on effective transatlantic leadership, case studies on best practices, and ideas for leading impact will be achieved by the following actions. GMF will create an annual call for short and medium length thought pieces on leadership practices or case studies to share among members of the network, or to provide background briefs to issue-based seminars and/or workshops.

To bring the dynamic exchange and learning of a leadership lab to the alumni community, GMF is pleased to commit to the following three objectives that resulted from alumni brainstorming sessions:

- **OBJECTIVE 1:** Leverage technology and purpose to strengthen a community of positive change leaders
- **OBJECTIVE 2:** Deepen alumni learning through strategic, organized learning and action
- **OBJECTIVE 3:** Create an annual fund campaign through the Alumni Leadership Council to capitalize these goals

The following pages detail the coordinated action efforts GMF will pursue with alumni leaders to realize these goals within a three-year period. We invite you to engage with these action items and consider your best avenue to commit to transatlantic leadership over the coming three years.

Objective 1: Leverage purpose and technology to strengthen GMF's network of positive change leaders

Across all of the topics discussed at "Transatlantic 20/20," leaders' eagerness to harness the latest technological tools to enhance their ability to connect with each other and lead was apparent. Additionally, participants made cases for the expansion of GMF activity to existing and new markets for strategic transatlantic relationship building. GMF commits to leveraging technology innovations to further alumni networking and focus on tactics to strengthen and deploy alumni in existing and new markets.

GMF commits to the following actions:

ACTION 1: Enhance the use of existing social media platforms. *Develop in 2017.*

ACTION 2: Develop an all-in-one platform to facilitate engagement among alumni, including their ability to locate and contact each other, create affinity groups, take part in alumni activity, and submit project proposals, as well as donate. Make this platform accessible on smart phone and tablet devices. *Develop in 2017 and launch in 2018*.

ACTION 3: Integrate new fellows in this platform before they graduate to the transatlantic leadership network. *Develop 2018-19.*

ACTION 4: Direct alumni organizing in and around regions of critical importance. *2017-2020*:

- A. Expand in Central and Eastern Europe and Eastern Partnership Countries in partnership with GMF's Bucharest office and in coordination with other GMF European offices and Civil Society Trusts in support of democratic and pro-European movements. Seek to expand fellowship opportunities in the region, invest in the development of in-country next generation activities and create opportunities for MMF hosting and alumni networking programs in EAP counties, with a priority on Ukraine.
- B. Expand a hub of leadership-oriented activity in partnership with GMF's Paris office and Congressional Affairs on inclusive leadership, legislative exchange, and understanding America. Activity will include hosting the 2020 Triennial Alumni Leadership Retreat.
- C. Expand other efforts that build connectivity among alumni priority regions, and between those regions and the rest of the alumni network. In Europe, emphasis will be placed the Netherlands and Denmark, Southern Europe (Portugal, Spain, Greece, and Italy), and Turkey

- D. In the United States, focus will shift to engaging subnational leaders in states with a base of 50+ alumni, which include: California, Texas, Illinois, Minnesota, Michigan, Ohio, New York, North Carolina, and Georgia. TLI will continue its partnerships with Congressional Affairs and Urban in this work.
- E. In the United States, mobilize and support alumni to resist current trends toward isolationism in the United States through stronger sub-national diplomacy and capacity building of international engagement for Nongovernmental organization outside of Washington, DC.
- F. In Europe, support alumni projects which seek to advance democratic and pro-European dialogue and foster stronger relationships with the United States despite rising anti-Americanism and growing divergence of views.
- G. In the post-Brexit era, expand GMF's nascent fellowship opportunities in the U.K. for leaders inside and outside of London, as well as support the growing hub of GMF's U.K.-based alumni.
- H. Enhance thought leadership, convening, and workshops to advance the practice of inclusive leadership across sectors and borders.

ACTION 5: Reorganize GMF's Transatlantic Leadership Initiatives staff team in alignment with this plan. Changes will include appointing a staff lead to direct the GMF alumni engagement strategy; redirect TLI staff fellows and volunteers on analysis of leadership trends; advance TLI staff positions in Berlin, Paris, and Bucharest; develop staff to better utilize GMF alumni as volunteers to advance this work plan.



Objective 2: Deepen the capacity of this alumni network through strategic, organized learning and action

GMF leadership alumni above all seek opportunities to engage in lifelong learning and networking that advances their ability to impact change through transatlantic collaboration. Across the three key retreat themes of Future of Democracy, Identity and Inclusion, and Global Engagement, GMF will provide opportunities for members of GMF's transatlantic leadership network to learn from each other, and to launch innovative projects. Leaders engage in both learning and practice, testing their assumptions, broadening perspectives, and launching partnerships around issues of central significance for their home communities.

ACTION 1: Grow Leadership Perspectives: GMF will strengthen its Leadership Perspectives calls to feature almost exclusively alumni. New programming will address the much-expressed desire to learn from other leaders in the network as well as gain insights into emerging trends that are going to have transatlantic impact. These calls will provide essential inputs for agenda setting and will address topics that help leaders be more effective, including strategies to balance work/life realities, effectively message with your netizens, and lead across cultures. *Develop 2017-18*.

ACTION 2: Expand Marshall Seminars: GMF will organize a series of two-to-three day, issue specific Marshall Seminars to address key themes from the Retreat and provide networking and partnership opportunities. Seminars will take place in locations that accelerate learning

"Since I was a young girl, I've felt driven to have a positive impact on the

world around me. This has been my purpose; I call it my North Star.

Looking back now, I'm really thankful for a piece of advice that a mentor gave me, which really helped me focus my passion and energy to effecting systemic change on issues that matter deeply to me. She advised me to think about the one key issue I could

significantly influence, one that speaks to my personal values. As we

look for ways to lead beyond our business, this advice continues to guide me and the team at Care.com."

-Sheila Marcelo (MMF '11), Founder and CEO, Care.com, Massachusetts, United States



and empower participants to help local organizations improve their strategies and best practices. Upcoming Marshall Seminars, include:

- 2017: On the Frontier of Democracy in Kiev, Ukraine
- 2018: On Inclusivity, Trade, and Diplomacy in the Netherlands
- 2019: *On Bridging Urban-Rural Divides* in the Pacific Northwest, including Alaska and Washington State

ACTION 3: Transatlantic Leadership Seminar: GMF will offer three Transatlantic Leadership Seminars to facilitate immersive learning on key leadership issues that surfaced during the Triennial Retreat. Seminars will take place in multiple locations over a period of seven to nine days and provide direct exposure to actors, drivers, and dynamics of contemporary trends. Upcoming Transatlantic Leadership Seminars include:

- 2017: On the Future of Global Engagement California and Mexico
- 2018: On Transformations of Faith and Power in Rome, Jeddah, and Istanbul
- 2019: On Education, Workforce, and Society Berlin, Copenhagen, and Tallinn

ACTION 4: Create a tradition of using a Triennial Transatlantic Leadership Retreat to promote fellowship and productive dialogue among alumni to measure progress and modify plans for continued effectiveness of their collective leadership. *Next Retreat: Summer 2020.*

ACTION 5: GMF will deepen its investment in Alumni Leadership Action Projects (ALAPs). Since 2015, GMF has awarded ALAP grants of \$2,500-5,000 to members of the GMF alumni network to incubate innovative projects that enable movement from ideas to action. Projects aim to strengthen transatlantic collaboration, while building leadership capacity, and ideally have a multiplier effect. Moving forward from 2017-2020, GMF will solicit Request for Proposals (RFPs) for three specific action areas under our three core leadership themes:

- 1. *Creating New Dialogues* Projects in this area will aim to bridge intergroup divides such as rural-urban, age gaps, cross-sector, and social and economic diversification or a new pluralism.
- 2. *Igniting New Leadership* Projects in this area will aim to enhance the leadership skills of our network, facilitating connectivity among alumni and transfers of knowledge, skills, and contacts between or among organizations in or between particular regions, professions, fields of engagement, youth and other demographics, strengthening the ability of alumni to effect change.
- 3. New Thinking on 21st Century Leadership Projects in this area will aim to identify issues and trends that are present on both sides of the Atlantic, account for their similarities while recognizing differences, and put forth solutions that work well in some communities and could also be applied elsewhere.

Objective 3: Create an annual fund campaign through the Alumni Leadership council to capitalize these goals and grow the network's reach across Europe and the United States



"For us at GMF the Marshall Memorial Fellows are our family. We hope they will help support both the work of the fellowship program and the GMF's mission of strengthening transatlantic ties."

- Marc Leland, Board Co-Chair, The German Marshall Fund of the United States

In order to capitalize the ideas alumni solidified at the Retreat, leading alumni and staff commit to expanding the membership in the GMF Alumni Leadership Council, new fundraising, and exploration of crowdfunding to advance specific alumni projects.

The Alumni Leadership Council will take on the responsibility of generating new capital to help ensure this plan has the growing resources to execute. GMF's Alumni Leadership Council consists of multiple membership levels of Bronze (\$250), Silver (\$1,000), Gold (\$2,500), and Platinum (\$5,000). Each level offers exclusive membership benefits such as recognition, leadership briefings, and access to alumni seminars. Margins from the Council help to underwrite key alumni programs. The Council commits to the following activities that will unfold over the next three years.

ACTION 1: Secure new grant-matching challenge to kick-start a vibrant alumni annual fund campaign. *June 2017*.

ACTION 2: Launch volunteer-led effort from the GMF Alumni Leadership Council with designated co-chair for a leadership group to run an 18 month campaign to expand membership for 65 to 120 members. Efforts will also include soliciting all alumni for a modest unrestricted gift. The financial goal will be to raise \$150,000 in new income from alumni. 2017-2018.

ACTION 3: Expand marketing of Transatlantic Leadership Seminar and Marshall Seminar sponsorship packages on both sides of the Atlantic. Raised funds will continue to write down the individual costs of participation for alumni, as well as provide sponsors branding opportunities. 2017-2018.

ACTION 4: Provide next-level giving opportunities through the Alumni Leadership Action Project Fund. Alumni-led projects have access to expanded resources through GMF alumni crowdfunding as well as through the triennial Marshall Prize competition. *2018-2020*.

ACTION 5: Alumni Leadership Council to build the Alumni Leadership Action Fund and actively participate in guiding alumni investments, narrow candidates for the Marshall Prize, and guide alumni service learning programs as part of their formal involvement in the Council. 2018-2020.



GMF Alumni engagement, 2017-2020: Executive Summary

Goal: Creation of a transatlantic "leadership laboratory" for the study and practice of effective leadership.



CONCLUSION

Europe and the United States are entering a period of uncertainty and opportunity that calls for innovative leaders to step forward and chart a path through the challenges that we face. It is the GMF leadership network's shared opinion that the transatlantic relationship needs greater cohesion as the countries that share democratic values struggle with trade and security in a multipolar world; continued racial, ethnic, religious, and economic divisions; the mass migration of peoples; climate change; and the economic, social, and political disruption resulting from the recent hyper-speed technological revolution and global economic integration. Leaders coming together to take action on these and other vital issues represents the most promising way forward — and GMF is committed to empowering this network to lead.

The German Marshall Fund of the United States, with its commitment to the goals of economic health, political stability, and assured peace that the Marshall Plan was created to support, calls upon its alumni to come together and define new priorities for collaborative, transatlantic action, so that we may employ our talents and networks for the benefit of generations to come.

For more information on how to become a part of this action plan, please contact the GMF Leadership Programs team:

Transatlantic Leadership Initiatives

1744 R Street NW
Washington, DC 20009
United States
leadershipprograms@gmfus.org

For more information on GMF's Alumni Leadership Council and to become a member, please click the following link: www.gmfus.org/alumnicouncil

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PARTICIPANTS

Ana-Maria Aelenei

Senior Program Officer The German Marshall Fund of the United States Bucharest (**Romania**)

Elizabeth Aguilera (MMF '10)

Journalist CALmatters San Diego, CA (**U.S.**)

Shubha Ahya

Physician Northwestern University Chicago, IL (**U.S.**)

Jen Algire (MMF '09)

President and CEO
The Greater Clark Foundation
Winchester, KY (**U.S.**)

Ali Aslan (AoC)

Journalist Berlin (**Germany**)

Kristel Ba

Program Officer
The German Marshall Fund of the
United States
Paris (France)

Lorenza Badiello (MMF '06)

Director of EU Office Emilia-Romagna Region Brussels (**Belgium**)

Mpanzu Bamenga (TILN '15)

City Council Member Municipality of Eindhoven Eindhoven (**Netherlands**)

Lora Berg

Senior Fellow, Leadership The German Marshall Fund of the United States Washington, DC (**U.S.**)

Mark Beunderman (MMF '12)

European Affairs Editor NRC Handelsblad Rotterdam (**Netherlands**)

Rickey Bevington (MMF '14)

Senior Anchor and Correspondent Georgia Public Broadcasting Atlanta, GA (**U.S.**)

Allison Binns (MMF '16)

Senior Advisor Chevron San Ramon, CA (**U.S.**)

John Boerstler (MMF '11)

Executive Director NextOp Houston, TX (U.S.)

Luther Brewster (MMF '10)

Chief, Division of Policy and Community Development Florida International University Aventura, FL (**U.S.**)

Jason Bristol (MMF '16)

Partner
Cohen Rosenthal & Kramer LLP
Cleveland, OH (U.S.)

Terry Bruner (MMF '14)

Principal and Founder Terry Bruner Law Office Houston, TX (U.S.)

Victoria Bucataru (MMF '17)

Program Director Foreign Policy Association of Moldova Chisinau (**Moldova**)

Ana Bulgar (MMF '16)

Co-Founder
Black Button Books
Bucharest (**Romania**)

Michael Byun (MMF '15)

Executive Director Asian Services in Action, Inc Cleveland, OH (U.S.)

Carrie Carpenter (MMF '10)

President Gordon Square Acts District Cleveland, OH (**U.S.**)

Stephen Caviness

Program Officer Cleveland Foundation Cleveland, OH (**U.S.**)

Mihai Cazacu

Corporate Security Senior Expert OMV Petron Bucharest (**Romania**)

Sewell Chan (MMF '12)

International News Editor New York Times London (**UK**)

Joe Cimperman (MMF '03)

President Global Cleveland Cleveland, OH (**U.S.**)

Vlada Ciobanu

Program Manager National Democratic Institute Moldova (**Moldova**)

Matthew Clayson (MMF '16) Vice President, General Counsel Detroit Trading

Birmingham, MI (U.S.)

Ajenai Clemmons (MMF '16 &

TILN '15)
PhD Student
Duke University
Durham, NC (**U.S.**)

Claudia Colla (MMF '08)

Legal and Policy Affairs Officer European Commission Brussels (**Belgium**)

Kevin Cottrell (MMF '08)

Director, Transatlantic Leadership Initiatives The German Marshall Fund of the United States Washington, DC (U.S.)

Nicole de Beaufort (MMF '13)

President EarlyWorks Detroit, MI (**U.S.**)

Thierry Deau

Founding Partner, Chief Executive Officer Meridiam Infrastructure Paris (**France**)

Gordana Delic

Director, Balkan Trust for Democracy The German Marshall Fund of the United States Belgrade (**Serbia**)

Frank Denton

Editor The Florida Times-Union Jacksonville, FL (**U.S.**)

Stephane Distinguin (MMF '12)

CEO faberNovel Paris (**France**)

Milos Djukelic (MMF '14)

Producer, Director and CEO Red Production Belgrade (**Serbia**)

Megan Doherty

Transatlantic Fellow
The German Marshall Fund of the
United States
Washington, DC (U.S.)

Karen Donfried

President
The German Marshall Fund of the
United States
Washington, DC (U.S.)

Julie Egan (Asmus '14)

Deputy Director
White House Detroit Working
Group
Washington, DC (**U.S.**)

Yunus Han Emre (TILN '16)

Chairman
State Network of Integration
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Integration Commissioner Tempelhof-Shöneberg Berlin (**Germany**)

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City of Turin
Turin (**Italy**)

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Attorney
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Cleveland, OH (U.S.)

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