



MARATHON EDUCATION PARTNERS | ANNUAL REPORT

'08

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Vicki &amp; Jim Adams

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David Aman

Dan &amp; Amanda Blaufus

John Bloss &amp; Janet Matthews

Ellyn Bye

Jeff &amp; Leah Cronn

Rolf &amp; Margie Ellingsen

Andrew &amp; Margo Fowler

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Blake Martin &amp; JoAnn Wolfe

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Kurt &amp; Joanne Ruttum

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Ann Miller &amp; Desi Bliss

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**'08 Marathon Partners**

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Bryan Concannon &amp; Debi Dereiko

Richard &amp; Eileen Cronn

Daniel Domenighini

Malcolm &amp; Margo Erickson

Karen Freiheit

Kristi Hanson

Coral Kafel

Mark &amp; Elizabeth Nye

Robin Willoughby

## A Letter from our Managing Director

In 2008, Marathon Education Partners continued to expand its influence in the community by growing its Scholar ranks and program. Our powerful mission inspired many to become involved, and our growth in 2008 was exciting. During the year we matched ten new Scholars with Partners, and as of year end we have put college in reach for 58 Scholars in our five Scholar classes.

We have also been actively expanding the programs to support our Scholars as our first Scholar class approaches high school graduation. During the summer months, Scholars participated in three programs: the Scholar Think Tank, Minds Matter, and University of Oregon's Summer Enrichment Program.

The Scholar Think Tank, a pilot program in 2007, was expanded to serve 8 Scholars in 2008. During the Think Tank, Scholars were able to connect with each other, find their voices and learn to be leaders. They visited the Northwest Education Loan Association's offices, the NIKE campus, the financial consulting firm M Financial, and Oregon Health and Science University.

Through a new relationship between Marathon and University of Oregon, three Scholars were accepted on full scholarship to U of O's Summer Enrichment Program, where they were able to take college classes, stay in dorms, and experience other facets of college life.

We were excited that through Marathon's introduction, three of our Scholars were accepted into the national college enrichment organization, Minds Matter, which has a branch in Portland. Minds Matter has paired our Scholars with an academic mentor, who will help the Scholars expand their educational experience and prepare a strong resume for college admissions.

As our first class of Scholars approaches college, Marathon is helping to forge the relationships that will help our Scholars to successfully achieve their goal of attending college. Marathon is able to provide our Scholars with the foundation they will need to succeed, through program elements such as the Scholar Think Tank and our relationships with other college preparatory organizations.

Marathon Education Partners and our Scholars look forward to sharing our continued growth with you, and thank you for making it possible.

Samara Clark  
*Managing Director*

## Our Mission

Marathon Education Partners strives to provide encouragement, guidance, and a higher education scholarship opportunity to children with financial need.

## Our Core Values

- Create opportunities
- Transform lives
- Share experience

## Our Guiding Principles

- We believe that opportunity can change a life.
- We desire to share experience and good fortune with kids who have less.
- We believe in the importance of education to the person a child becomes.
- We desire to have a direct, long-term impact on the life of a child.
- We believe in the need to act, not just discuss.
- We desire to expand a child's view of the possible.
- We believe that a Partner's participation will benefit the Partner as much or more than the Scholar.

## Our Story

Marathon was founded by Dan Blaufus, an attorney at NIKE who was troubled by rising tuition costs and reductions in federal and state aid for higher education. Driven to action by the tragic events of 9/11, Dan decided to develop a simple yet effective program that would inspire ordinary citizens to act. Dan, his wife and three other couples officially launched Marathon Education Partners on September 11, 2002.

## Our Program

Our program selects promising students (Scholars) in the 4th grade whose families lack the financial resources to afford college. Scholars are then matched with individuals or families (Partners) who agree to pledge \$100/month for 10 years toward a college investment/savings

fund. Partners also agree to contact their Scholar every month to provide encouragement and guidance over that 10-year period. In addition, Scholars participate in community events designed to motivate and encourage them to succeed academically.

## Our Scholars

Marathon works closely with local schools to identify and recruit high-achieving students for the program who aspire to go to college. As a guideline, Marathon seeks students who qualify for free and reduced lunches in the public schools (185% of the Federal Poverty Guideline).

## Our Partners

Partners are individuals and families who want to give back to their communities by sharing their experience and knowledge with children through the crucial stages of their educational development. Partners agree to make a financial commitment of \$100 a month for ten years and to connect directly with their Scholars on a monthly basis. Since 100% of Partner contributions go directly to funding scholarships, Marathon provides a simple, effective way to invest in the future of a child.

## Our Successes

From Marathon's founding in September 2002 through the end of 2008, 58 aspiring low-income children from Portland, Vancouver, WA and Pendleton have joined the program. These 58 children are supported by 94 people who have become Partners and have pledged \$696,000 toward financial assistance for college. Marathon's first group of Scholars, the 2003 Scholar Class, expects to graduate from high school in 2011. **It is with much pride that we report that of our initial Scholar class of 14 Scholars, 4 anticipate graduating 1 year early, in the summer of 2010.**

The children in our program no longer say "If I get to college, I'll become a scientist." Instead, they state "When I get to college, I'll become a scientist." This represents a major transformation in how these children (and their families) view their futures and view higher education.

## Highlights of 2008

- Throughout 2008, 21 individuals became new Partners which allowed us to offer 13 scholarships to new Scholars.
- During the year, we accepted 13 new Scholars into the program. These high-achieving Scholars make up Marathon Education Partners fifth class of college bound Scholars, the 2008 Scholar Class.
- In October, Marathon held its 5th annual auction, "Zoo Zydeco." The event was attended by 200 guests and grossed over \$94,000.
- During the summer months, Marathon Education Partners conducted the second "Scholar Think Tank". The Scholars visited local business in the Portland community including, NIKE, M Financial Group, Oregon Health and Science University and the Northwest Education Loan Association. 8 Scholars participated in the program, which was intended to increase their confidence, help them cultivate better leadership skills, expose them to a broad spectrum of education and career opportunities, and increase their commitment to obtaining higher education.
- Throughout the year, Marathon recruited Scholars from two schools in the Portland area: Arleta Elementary in Portland Public School District and Beaver Acres in the Beaverton School District.
- Marathon forged a relationship with University of Oregon's Summer Enrichment Program enabling three Marathon Scholars to attend the summer program on full scholarship. The Scholars spent a week on U of O's campus attending classes, staying in dorms and learning how to become more prepared for their goal of attending college.
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## Acknowledgements

We would like to thank everyone who donated to Marathon Education Partners in 2007. Each of you make it possible for Marathon to offer life-changing hope to high-achieving students in our community.

Please accept our apologies if we have inadvertently failed to recognize your gift or have listed it incorrectly.

### Gifts-Corporations, Foundations and Organizations

Allen Trust Company  
 Brian and Gwyneth Booth Fund of the Oregon  
 Community Foundation  
 Global Impact  
 ING Financial Advisers, LLC  
 Landye, Bennette, Blumstein LLP  
 MBAdams Financial, Inc.

Merrill Lynch  
 NIKE, Inc.  
 Northwest Education Loan Association  
 Schwabe, Williamson, and Wyatt  
 Tonkon Torp LLP

### Gifts-Individuals

John and Christine Aanderud  
 Michael and Romy Adams

Jim and Vicki Adams  
 Doly Alevizatos  
 David Aman  
 Vicki and Norman Ballou  
 Mark Benson  
 Gary Berne  
 Dan and Amanda Blaufus  
 Larry and Anne Blaufus  
 John Bloss

Amy Blumenberg and Christopher Potter  
 Robert and Nell Bonapart  
 Adrienne Boxer  
 Daniela Brito  
 George and Wendy Brown  
 Ellyn Bye  
 Deborah Cameron  
 Jim and Julie Carter  
 Wendy Chan and Jake Rosser  
 Eric and Ingrid Clazzard  
 Ted and Meghan Collins  
 Bryan Concannon and Debi Dereiko  
 Brian and Kristen Cronn  
 Jeff and Leah Cronn  
 Richard and Eileen Cronn  
 Tony and Jill Daniels  
 Kharolina Dhanudimuljo  
 John and Martha Drum  
 Daniel Domenighini  
 Bill and Debby Dover  
 Rolf and Margie Ellingsen  
 Malcolm and Margo Erickson  
 Bill Fahey  
 Nelson and Sharron Farris  
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 Andrew and Margo Fowler  
 Deborah Galardi  
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 Tauni and David Hemminger  
 Jim and Carol Hibbs  
 Ashley Horacek  
 Jeff Horacek  
 Josh and Kerstin Husbands  
 Coral Kafel  
 Janet Kahn  
 Paul and Carolyn Kelly  
 Peter Koehler  
 Dale and Mall Kuhn  
 Doug and Daryl Leonetti  
 Karen Lettner  
 Jim and Frani Lilienthal  
 Jenny Loth  
 Shah and Marney Malik  
 Gary Manchester  
 Patty Marrison  
 Blake Martin and JoAnn Wolfe  
 Marilyn Martin  
 Janet Matthews  
 Dan and Cathy Maxwell  
 Rick and Sarah Melching  
 Ann Miller and Desi Bliss

Sean Munger  
 Darcy Norville and Ira Zarov  
 Mark and Elizabeth Nye  
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 Mary Vanderweele  
 Tia Wagner  
 Steve and Lainie Wilker  
 Robin Willoughby  
**Gifts-In Kind**  
 24 Hour Fitness  
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 Michael and Romy Adams  
 Vicki and Jim Adams  
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 John and Lauri Blaufus  
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 William Drummond  
 Eddie Bauer  
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 Eola Hills Winery  
 Margo Erickson  
 Ethos Salon  
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 Fossil  
 The Fossil Cartel Inc.  
 Margo and Andrew Fowler  
 Franklin Covey  
 Gilyn McKelligon Interiors, LLC  
 The Greased Line Fly Shoppe  
 Great Wolf Lodge  
 Greek Cusina  
 Heathman Hotel  
 Ted and Janece Herzog  
 Jim and Carol Hibbs  
 Higgins  
 Elizabeth Highet  
 Caroline Hoof  
 Hub Optix  
 Integrity Spirits  
 J Crew  
 Jane's Vanity  
 Joe's Place Farm  
 Brett and Sonia Jones  
 Cary Jones  
 Sonia Jones  
 Ryan Josephson and Debbie Herron  
 Juicy Couture  
 Kate Spade  
 Kathleen's of Dublin  
 Cheryl Keichs

Kitchen Kaboodal  
 Lauro Kitchen  
 L'Eschelon Model Central LLC  
 Andy Lilienthal and Nathan Potratz  
 Jim and Frani Lilienthal  
 Linnea Osterberg Photographer  
 Little Gym Beaverton  
 Little Gym Lake Oswego  
 The Little Gym International  
 Louis Vuitton  
 Gary Manchester  
 Mario's  
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 McCormick & Schmick's  
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 OMSI  
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 Origins Natural Resources  
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 Turid Orwen and Wally VanValkenburg  
 Palamino  
 Tom Palmer and Ann Carter  
 Paradise Pens  
 Paragon  
 Paramount Hotel Portland  
 Pastini Pastaria  
 Ron and Toni Paul  
 Paul Schatz Furniture  
 Peet's Coffee and Tea  
 Joe and Sue Petrina  
 Pharaca Integrative Pharmacy  
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 Pizzacato  
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 Pottery Barn  
 Present Perfect  
 Steve and Candace Primack

Print Arts Northwest  
 Pro Scape  
 Ready Paint Fire  
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 Reynolds Optical  
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 Shutterbug  
 Simpatica Dining Hall  
 Skamania Lodge  
 Ski Chalet  
 Smith and Hawken  
 Ron and Ann Smits  
 Sokol Blosser Winery  
 Something Blue Photography  
 Sorelle Spa Salon  
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 Urbaca Salon  
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 Jan Von Bergen  
 Watchworks Inc.  
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 Zao Noodle Bar  
 Bill Zuelke

**Volunteers**

Carol Almgren  
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 Rita Bell  
 Duncan Carranza  
 Sue Corbett  
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 Anne Dillon  
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 Tura Holz  
 Annie Hunt  
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 Gretchen Reuter  
 Melissa Reuter  
 Bethany Reisberg  
 Eric Sheldon  
 Leslie Sunseri  
 Ellen Turner  
 Bill Zulke  
 Val Zulke



## 2008 Financial Summary

### Statement of Program Activity

January 1, 2008 - December 31, 2008

#### Revenue

|  |                  |
|--|------------------|
| Contributions, Gifts and Grants              | \$129,433        |
| Net Income from Special Events or Activities | \$20,951         |
| Other Investment Income                      | \$9,543          |
| <b>Total Revenue</b>                         | <b>\$159,927</b> |

#### Expenses

|                        |                 |
|------------------------|-----------------|
| Program Services       | \$61,573        |
| Management and General | \$10,437        |
| Fundraising            | \$22,043        |
| <b>Total Expenses</b>  | <b>\$94,053</b> |

#### Change in Net Assets

**\$65,873**

### Statement of Financial Position

as of December 31, 2008

#### Current Assets

|   |                  |
|---|------------------|
| Marathon Business Checking Account        | \$15,423         |
| Marathon Scholarship Transitional Account | \$13,938         |
| Marathon Business Savings Account         | \$142,839        |
| <b>Total Current Assets</b>               | <b>\$172,200</b> |

#### Investments

|                                     |                  |
|-------------------------------------|------------------|
| 2003 Scholars Vanguard Account      | \$89,851         |
| 2004/2005 Scholars Vanguard Account | \$58,269         |
| 2006 Scholars Vanguard Account      | \$39,749         |
| 2007 Scholars Vanguard Account      | \$14,749         |
| Discretionary Scholarship Account   | \$5,121          |
| <b>Total Investments</b>            | <b>\$207,252</b> |

#### Total Assets

**\$379,452**

#### Net Assets

|                         |                  |
|-------------------------|------------------|
| Restricted Funds        | \$207,252        |
| Unrestricted Funds      | \$172,200        |
| <b>Total Net Assets</b> | <b>\$379,452</b> |

## A Special Thank You to our Officers and Trustees

Jim Adams

Rick Melching

Jim Filiault

Teresa Baldwin

Shouka Rezvani  
*Vice Chair*

Margo Fowler

Dan Blaufus  
*Past Chair*

Kathy Saitas

Jim Lilienthal

Ellyn Bye

#### Current Trustees

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