

The background of the cover is a photograph of a modern brick building with large windows and a glass entrance. In the foreground, there is a brick-paved plaza with several people walking. Some people are blurred, suggesting motion. There are trees with green leaves and some red flowers in the bottom right corner. A blue diagonal graphic element is at the bottom right.

annual leadership stewardship report

2017-2018

leadership.wharton.upenn.edu

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leadership team^(letter)

Dear Board Members, Partners, and Friends,

We are pleased to share with you our annual report from the 2017-2018 academic year. We began the year with the celebration of the incoming classes of students and ended the year with the 7th annual Lipman Family Prize award ceremony and the 22nd annual Leadership Conference.

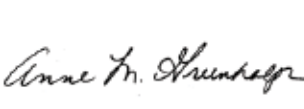
In the pages ahead, you will find overviews of the main audiences we serve as well as overviews from each of our Leadership Initiatives: the Anne and John McNulty Leadership Program, the Center for Leadership and Change Management, and the Barry & Marie Lipman Family Prize.

We hope you find the content within both informative and inspiring and, as always, we look for your advice and guidance on how best to maintain our levels of quality and excellence across our audiences and our many constituents.

Thank you for your continued engagement and support and we look forward to seeing our board members in New York City on September 12, 2018 and on Penn's campus February 26-27, 2019.


Mike Useem
Director
Center for Leadership
and Change Management


Jeff Klein
Executive Director
McNulty Leadership Program


Anne Greenhalgh
Deputy Director
McNulty Leadership Program



mcnulty leadership (program overview)



At the McNulty Leadership Program, we see leadership as the act of making a positive difference in the world. We enable and support every student in the pursuit of deeper self-awareness and improved leadership skills to advance individual success and team and community performance.

We develop as leaders and teammates by testing our knowledge, skills, and abilities through new experiences. Our programs provide many different roles and contexts in which students can learn. Whether it is through our community-wide programs like Authors@Wharton and Wharton Leadership Ventures to our many fellowships and student groups, we work to give students and executives opportunities to:

TAKE ACTION: By embracing leadership moments of their own making, students can increase their resilience, adaptability, and capacity to lead in an authentic way.

REFLECT: By coaching, mentoring, and gathering feedback from others, students can develop their self-awareness, realize salient character strengths, and identify personal opportunities for personal growth and development.

EXPERIMENT: By accepting stretch experiences, students can test and practice their range of leadership styles from directive to empowering to transformational.

APPLY: By putting leadership lessons learned in and out of the classroom into deliberate practice, students can build skills, especially the ability to:

- Think creatively and critically
- Use emotional intelligence
- Communicate well with others

- Give and receive feedback
- Exercise influence
- Motivate oneself and others
- Work well in a team
- Contribute to synergistic group decision-making
- Cultivate organizational awareness, especially in an understanding of organizational culture

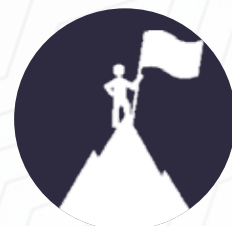
The 2017-18 academic year focused on enhancing and adapting our current suite of programs so that we may better serve our many audiences and deepen participation and impact.

Some highlights include:

- We organized and ran over 30 program and speaker events, and conferences from September 2017-June 2018
- Due to the increased success of the Authors@Wharton Speaker Series, the Wharton Leadership Lectures administration moved from the MBA Program Office to the McNulty Leadership Program. In partnership with Wharton Events, we now create, implement, and manage roughly three to seven additional speaker events per year that add to the reputation of the McNulty Leadership Program as the thought leader in leadership development throughout the Wharton School and the University of Pennsylvania.
- We expanded our MBA for Executives offerings to include additional workshops and a modified version of the MBA program, P3: Purpose, Passion, and Principles.
- We revamped the Executive Education course *The Leadership Journey*. The new course, entitled *Becoming a Leader of Leaders: Pathways for Success*, launched this May includes new research, new team exercises and case discussions designed to provide participants with the strategies to strengthen leadership and build highly effective teams for today and tomorrow.

undergraduate

UG



68

Leadership Development Opportunities



9

Fellowships and Student Groups



225

Partnerships

KEY

UG, MBA, EMBA, EE,
Public, Interdisciplinary

Advanced Management Program

AMP is an immersive five-week program where senior leaders hone their leadership capabilities. **EE**

Authors@Wharton Speaker Series

World-renowned authors come to campus and share their ideas on topics ranging from management to the social sciences to gender in the workplace. **UG, MBA, EMBA, EE, Public**

Authors@Wharton Student Committee

The Authors@Wharton Student Committee plays an integral role in expanding and enriching the speaker series in a variety of ways, from suggesting potential speakers and topics to managing events. **UG, MBA**

CEO Academy

This two-day program provides CEOs with an unparalleled opportunity to connect with peers in a dynamic setting that enhances their strategic-decision making skills. **EE**

Innovation Project

Learning Teams work together to develop an innovative solution to a complex problem. **MBA**

Coaching and Feedback Program

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GUIDE

Through the Guiding Undergraduates in their Development and Education program, MBA students mentor Undergraduate students. **UG, MBA**

High-Performing Teams

Participants develop the ability to build, effectively lead, and successfully sustain high-performing teams. Explore team dynamics in and out of the classroom. **EE**

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During the two-day retreat, MBA students are introduced to their Learning Teams and begin the process of team formation. **MBA**

Leadership Conference

An annual conference featuring speakers in leadership roles across industries. **UG, MBA, EMBA, EE, Public**

The William P. Lauder Leadership Fellows

Fellows mentor first-year students to develop their personal leadership skills and optimize their Wharton MBA experience to achieve success. **MBA**

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Students with prior board experience serve as peer coaches to nonprofit board fellows. **MBA, Interdisciplinary**
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P3 Group Facilitators

Seasoned veterans of the program facilitate group conversations over the nine-week curriculum. **MBA**

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Ventures- Expeditions, Intensives, Workshops

Outdoor experiential based treks that provide genuine environments of uncertainty and change. **UG, MBA, EMBA, EE**

Wharton 101: Business and You: Exploring Business Pathways and Developing Your Potential

A course designed to increase understanding of interrelatedness of business disciplines. **UG**

Wharton 101 TAs

Teaching Assistants help support the delivery and class management of Wharton 101.

Workshops

One-to-three day programs that highlight alternative leadership education methodologies or specific topics. **UG, MBA, EE**



Ben (profile) Worsham WG' 19

majors: Organizational Effectiveness
and International Studies
Enrolled in Huntsman Program

recruiting focus

- Consulting
- Sustainability
and Finance

student life

- Undergraduate Venture
Fellow - Utah
- Pottruck Gym Climbing Instructor
- Penn Outdoor
Foundation Ambassador
- Authors@Wharton Speaker
Series Attendee
- Studied Abroad in
Brazil and Portugal

leadership

- Undergraduate Leadership Ventures Co-Chair
- Huntsman Student Advisory Board Co-Chair
- Financial Literacy Community Project Teacher

majors: Marketing and Management

Christine (profile) Walker WG' 19

recruiting focus

- Internship: Bloomingdales
- Retailing

student life

- Volunteer at Henry C. Lea
Elementary School
- Black Wharton Club
- Wharton Women
- Authors@Wharton Speaker
Series Attendee
- Wharton Leadership
Lectures Attendee
- Wharton Retail Club

leadership

- CEO of Penn Fashion Week
- Finance Director of *The WALK Magazine*
- Head TA for *Wharton 101 - Exploring Business
Pathways and Developing your Potential*

Rosemary Boyd

(profile)
WG' 19

majors: Statistics and Behavioral Economics



career

- Internship: Artisan Partners Mutual Fund
- Career After Wharton: Bain Capital Private Equity

student life

- Penn Soccer Varsity Team
- Wharton Women Club
- Riepe College House
- Glamour Gals and Young Quakers Volunteer
- Committee for Fellowship and Honorary Degrees
- Authors@Wharton Speaker Series Attendee
- Scholar Athlete Tutor
- Wharton Investment and Trading Group

leadership

- Wharton Leadership Ventures Chair
- Wharton Leadership Venture Fellow – Utah, Antarctica, Trauma Center
- Wharton Steering Committee
- Penn Athletics Wharton Leadership Development Academy



As a Venture Chair and Venture Fellow, I have learned so much about myself and the power of mentorship. The UG Ventures brings students on experiential learning trips because the outdoors can allow us to pressure-test our character in a realistic way. I've been trained to lead groups of students with the idea that leadership, teamwork, and communication are more easily mastered outside the classroom. WLV has taught me the cascade effect that a single teacher, venture fellow, or role model can have. Through empowering each student to find their own voice of leadership on these journeys, they can magnify the impact they can make on a community."

**Through
empowering each
student to find their
own voice...they can
magnify the impact
on community**

testimonial
(undergraduate)

undergraduate (overview)

The first full year of the Leadership Journey curriculum incorporates the following key elements, designed to allow students the opportunity to grow and learn in a flexible environment.

- .5 credit courses for each of the students' four years, each course building on the leadership development coursework of the previous year.
- The addition of Legal Studies and Business Ethics coursework to the fundamentals
- Revisions to the general education requirement and an increase in the number of unrestricted electives to increase flexibility to balance breadth and depth in the liberal arts and business
- Greater emphasis on innovation and technology and the global economy

All incoming students begin their leadership journey as freshman and take a series of four half-credit modules throughout their undergraduate years.

- Freshman Gateway (.5 CU)**
Sponsored by the Wharton Undergraduate Division, this gateway course entitled *Business and You* gives students the opportunity to hear from faculty thought-leaders from all 10 departments, explore their academic options, and begin the process of self-discovery -- the first step of the leadership journey.
- Sophomore Oral and Written Communication (.5 CU)**
Sponsored by the Wharton Communication Program, this course will give students the chance to hone their oral and written communication skills.
- Junior Teamwork and Interpersonal Dynamics (.5 CU)**
Sponsored by the Management Department, this course will give students the opportunity to refine their interpersonal skills and to learn how to work in a group and make a group work.
- Senior Capstone Course (.5 CU)**
Sponsored by multiple departments, this summative course will give students the occasion to synthesize what they have learned in their core and elective courses and along their leadership journey.



15
Leadership
Ventures



4
Fellowships and
Student Groups

CLASS SIZE PER YEAR



class 2017 (634)



class 2018 (646)



class 2019 (691)



class 2020 (546)



undergraduate ventures

In the 2017-2018 academic year, the Undergraduate Venture Program ran 4 expeditions, 5 intensives, and 6 workshops. 12 Undergraduates participated in the new Winter Venture to Antarctica.

PROGRAM	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	SEATS FILLED	OPPOR-TUNITIES
MGMT 100													151	1
Wharton 101													684	4
WLV Expeditions													34	4
WLV Intensives													76	5
WLV Workshops													103	6
MGMT 100 TAs													36	1
Wharton 101 TAs													42	1
Venture Fellows													17	1
A@W Committee													6	1
TOTALS													1149	24



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Gayatri Karandikar (profile) WG' 19

majors: Marketing and Operations;
Entrepreneurship and Innovation

recruiting focus

- Internship: PepsiCo, Global Strategy
- Consumer Products (Food & Beverage)
- Marketing Club (Trek Director)
- PepsiCo Invitational Competition

student life

- Dance Studio
- India Club
- Yoga and Wellness Club
- Tennis Club
- Charity Fashion Show

leadership

- William P. Lauder Wharton Leadership Fellow
- Diversity Admissions Fellow
- Communications Fellow
- Wharton Women in Business (VP)

majors: Finance; Management

Chanelle Lansley (profile) WG, 19

recruiting focus

- Investment Banking
- Internship: Citigroup
- Finance Club

student life

- African-American MBA Association
- Storytellers Board
- Common Cents Board
- Authors@Wharton Speaker Series Attendee

leadership

- William P. Lauder Wharton Leadership Fellow
- Nonprofit Board Fellow
- TA for *Leading Diversity in Organizations*

Aghogho Ughwanogho (profile) WG' 19

major: Corporate Finance

recruiting focus

- Internship: American Express
- Corporate Finance

student life

- African American MBA Association (AAMBA)
- Media and Entertainment Club
- Student Admissions Program
- Wharton Analytics Club
- Wharton Leadership Lectures Attendee
- Authors@Wharton Speaker Series Attendee
- Wharton FinTech Club
- Wharton Analytics Club

leadership

- William P. Lauder Wharton Leadership Fellow
- Guide Mentor
- Wharton African Students Association (WASA)



The quality of people is phenomenal, including faculty and students alike. I have never had such meaningful human connection and intellectual discourse in any other forum. Furthermore, the organic nature of Wharton's programming provides students with the opportunity to shape their own path as well as drive new initiatives they would like to see take hold at the university. The quality of the students, quality of the classes, and the strong network. Since it is a big school there are also so many opportunities no matter what you want to do. The McNulty Leadership Program is an incredible asset full of diverse and meaningful programs. They have an opportunity for everyone."

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testimonial
(mba)

mba

(overview)

MBA students are introduced to the McNulty Leadership Program during PreTerm in August of their first-year. Students meet their learning teams during the two-day Learning Team Experience and are immediately called to act and collaborate with one another, creating a vision and team-operating principles for their group that will last through the end of their first core course, *Management 610: Foundations of Teamwork and Leadership*.

Once the MGMT 610 course ends, students move into their first semester.

Various information sessions are held throughout the fall and spring semesters to provide students the opportunity to hear about our co- curricular and fellowship programs.

Through a generous endowment from William P. Lauder, the Leadership Fellows has been renamed to the William P. Lauder Wharton Leadership Fellows. This gift will provide sustainable resources to select, train, and support the Fellows in their work with first-year MBA students as well as the ability to bring a new one-day leadership symposium to the program that will be dedicated to exploring leadership principles in action.

MBA students are able to choose from 26 unique leadership development opportunities within the McNulty Leadership Program ranging from fellowships to coaching to ventures to Authors@Wharton Speaker Series. Over 1200 students in the MBA program (69%) participate in one of our programs.





1241 unique participants and participation rates
(not including Required Curricular Initiatives)



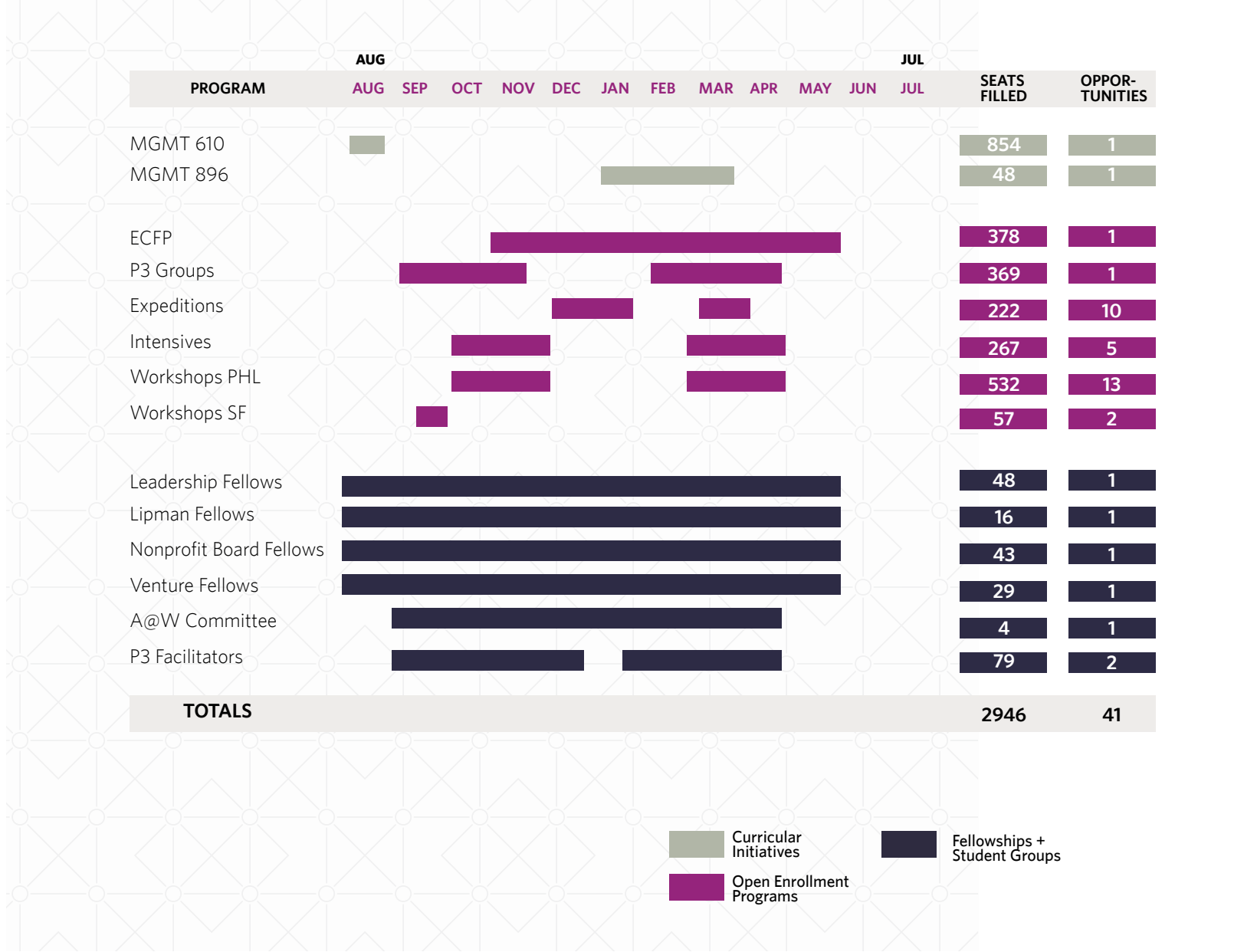
36%
Enroll in 1 program



31%
Enroll in 2 programs



33%
Enroll in 3 programs



CLASS SIZE PER YEAR



mba for executives

EMBA



MBA for Executives: EMBA

KEY

UG, MBA, EMBA, EE,
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Vidya (profile) Murphy WG' 19

majors: Entrepreneurship
Global Consulting Practicum -
Uganda and Israel



recruiting focus

- **Before Wharton:**
PWC and Becton
Dickinson (BD)
- **After Wharton:**
MedCrypt

student life

- Alaska Leadership Venture
- Rowing Venture in
San Francisco
- Healthcare Club
- San Francisco
Leadership Retreat

leadership

- Class Gift Co-Leader
- Entrepreneurship Club Co-Leader

“

The Wharton venture was the most physically grueling thing I've ever done, but worth every step. Being emotionally and physically spent led me to introspect on being able to push myself and my decision to join a startup.

testimonial
(mba for executives)

mba for executives (overview)

Students in the MBA for Executives East (WEMBA East) and MBA for Executives West (WEMBA West) can receive six sessions with a coach as part of the Coaching and Feedback Program.

Both programs (EMBA East and EMBA West) are given the chance to participate in the Leadership Ventures Rowing Intensive and the Leadership Ventures WEMBA-only Alaska Venture, which gave them additional opportunities to focus on teamwork and challenge in unfamiliar contexts.

Open to all students and held on the last day of classes before graduation, the WEMBA Capstone serves as a final day of reflection for the Wharton MBA for Executives experience. Members of Class 41 were brought together

Leadership development opportunities outside of the classroom are highly customized to the needs of our executive MBAs and working professionals.

as a full class to share their reflections and what the WEMBA experience meant to them. The learning teams were reconvened and members were asked to provide feedback on each other's leadership development as a result of attending Wharton.

Members of the graduating class commit to carrying their Wharton experience forward into the future and explore how their lives are and will be different as a result of attending the WEMBA program.



12 opportunities



586
participants

[illegible]

executive education EE



Executive Education: EE

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An annual conference featuring speakers in leadership roles across industries. **UG, MBA, EMBA, EE, Public**

William P. Lauder Leadership Fellows

Fellows mentor first-year students to develop their personal leadership skills and optimize their Wharton MBA experience to achieve success. **MBA**

Leadership in Action

Weekly radio show with a live, call-in format featuring guests from diverse industries. **UG, MBA, EMBA, EE, Public**

Lipman Family Prize

An annual global prize celebrating leadership and innovation in the social sector.

Lipman Family Prize Fellows

Fellows help plan and execute elements of the award process such as reviewing applications, analyzing data, preparing materials for the Prize Committee and attending the annual awards ceremony. **MBA, Interdisciplinary**

Management 610: Foundations of Leadership and Teamwork

MGMT 610 is an intense immersion experience, which includes a custom-designed team-based highly interactive simulation. **MBA**

MBA Venture Fellows

Second-year MBA students create an environment for individual and team leadership development on a specific Leadership Venture. **MBA**

Nonprofit Board Fellows

Fellows are matched with Philadelphia nonprofit organizations with the goal of providing valuable board experience to our students while also supporting the mission of the partner organizations. **MBA, Interdisciplinary**

Nonprofit Executive Committee

Students with prior board experience serve as peer coaches to nonprofit board fellows. **MBA, Interdisciplinary**

P3: Purpose, Passion, Principles

P3 is an eight-week curriculum that brings together students in a structured way to gain a deeper understanding of their own definitions of success and happiness and how these relate to their professional and life-long goals. **MBA, EMBA**

P3 Group Facilitators

Seasoned veterans of the program facilitate group conversations over the nine-week curriculum. **MBA**

Penn Athletics Wharton Leadership Academy

A partnership between Penn Athletics and McNulty Leadership Program, the Academy fosters the leadership abilities of Penn student-athletes. **UG**

Undergraduate Venture Fellows

Students create an environment for individual and team leadership development on a specific Leadership Venture. **UG**

Ventures- Expeditions, Intensives, Workshops

Outdoor experiential based treks that provide genuine environments of uncertainty and change. **UG, MBA, EMBA, EE**

Wharton 101: Business and You: Exploring Business Pathways and Developing Your Potential

A course designed to increase understanding of interrelatedness of business disciplines. **UG**

Wharton 101 TAs

Teaching Assistants help support the delivery and class management of Wharton 101.

Workshops

One-to-three day programs that highlight alternative leadership education methodologies or specific topics. **UG, MBA, EE**

Dr. Ndidi Nnoli Edozien (profile) AMP '16



career

- Group Chief Sustainability & Governance, Dagnote Industries, Ltd.
- Director of Strategy & Monitoring and Head of CEO Office, Nigerian Communications Commission
- Vice President, SecTrust Asset Management

leadership

- AM Microfinance Bank Board Member
- Founder/Chair of Growing Business Foundation
- Jim Ovia Foundation Trustee
- Rising Tide Africa Board Member



The world is changing and I felt it was time to step up in terms of my role in my country (Nigeria) and play a significant, important, and impactful role in leading change. In my AMP courses, I loved the fact that Wharton talked about business not from the myopic point of view of only finance, but married that with new topics like emotional intelligence, the strength of millennials, and the importance of communication. The AMP curriculum challenged me to push myself to the limits of my responsibility as a leader. “

The AMP curriculum challenged me to push myself to the limits

executive education

(overview)

With the **General Management Program**, senior executives are given a unique opportunity to accelerate their potential by infusing new knowledge and prepare for new challenges ahead. With the help of professional executive coaches, the program allows students to tailor their leadership journey to their specific needs. Participants in the GMP program are offered the McNulty Coaching and Feedback program, allowing them to receive six coaching sessions and a wrap-up session.

Our flagship course, the five-week **Advanced Management Program** offers comprehensive content and an experiential approach that creates an invaluable, reflective pause from the everyday CEO routine. AMP students travel to Randall's Island, the training ground for the New York City Fire Department and participate in the one-day FDNY Firefighting Simulation. During the five-week program, coaching is also delivered, both in teams and individually, to accelerate learning and personalized growth. Coaching sessions continue after the program concludes.

In partnership with the Aresty Institute for Executive Education, the McNulty Leadership Program ran 10 leadership courses in the 2017-2018 academic year.

The two-day **CEO Academy** brings together 15 of the world's most well-respected current and former chief executives to share what worked while leading their companies through major change.

The five-day **Creating and Leading High-Performing Teams** program is a unique executive leadership course that combines the best insights from research and case studies, all tested in the context of hands-on, experiential learning.

The five-day **Leadership Edge Program** uses a range of highly interactive approaches plus daily integration sessions to help students transition from technical roles to leadership roles.

The five-day **Becoming a Leader of Leaders: Pathways for Success** blends interactive lectures with team exercises, case discussions, computer simulations, and physical challenges that put the principles of leadership into practice.

PROGRAM NAME	DURATION	DATE	PARTICIPANTS
Advanced Management Program (AMP)	5 weeks	October 2017 May/June 2018	97
CEO Academy	2 days	November 2017	34
Creating and Leading High Performing Teams (HPT)	5 days	October 2017 June 2018	45
General Management Program	2 years	December 2017	Open
The Leadership Edge: Strategies for the New Leader (TLE)	5 days	November 2017 May 2018	45
Becoming a Leader of Leaders: Pathways for Success	5 days	September 2017 April 2018	19



center for leadership and change management



The mission of the Center is to stimulate basic research and practical application in the area of leadership and change, foster an understanding of how to develop organizational leadership, and support the leadership development agendas of both the Wharton School and the University of Pennsylvania.

The Center hosted three conferences this year. **The Organizational Behavior Conference** was in November 2017. Conference presenters were junior faculty on the cutting- edge research in the field of Organizational Behavior. Led by Assistant Professor Drew Carton, attendance for the two-day invite-only conference is kept small to provide an intimate setting that fosters collaboration ties and a supportive atmosphere.

The 22nd annual **Leadership Conference**, entitled *Leading in a World of Seismic Shifts* was held in June 2018. Speakers included Henry Timms, founder of Giving Tuesday; Sam Walker, Wall Street Journal Editor, Graham Charles, President & founder of the

Polar Tourism Guides Association; Jeff Bolton, CAO of the Mayo Clinic; and Kat Cole, Chief of Fire & Aviation, Department of the Interior.

Dr. Sigal Barsade continues to manage the study of emotions and organizational behavior through the **Katz Fund for Leadership and Emotional Intelligence**. This fund enables the continued preeminence of the Wharton School in the study and teaching of emotional intelligence, organizational culture, and leadership development and directly benefits organizational leaders, scholars, students, and alumni through the creation of new scholarly research.



9
research grants
funded



10,000+
leadership digest
subscribers



3
conferences

lipman family prize overview

The Barry & Marie Lipman Family Prize hosted its 7th annual award ceremony on April 20, 2018. In its 7th year, the Lipman Family Prize received applications from over 100 organizations that are dedicated to a range of global causes including economic development, education, environmental sustainability, gender equality, healthcare, human rights, food security, legal aid, safe water, poverty alleviation, and workers rights.

The 2018 top honoree prize (\$250,000 in unrestricted funds) was awarded to MyAgro.

MyAgro is a nonprofit social enterprise that enables smallholder farmers in Africa to finance themselves by using their mobile phones to purchase high-quality seeds and fertilizer and receive agricultural training so they may increase their incomes and move out of poverty.

Operation ASHA expands access to high-quality and affordable healthcare, particularly in regards to the treatment of tuberculosis, to disadvantaged communities by providing the last mile connectivity, i.e. service delivery to the underserved in India, Cambodia, and South America.

Ubuntu Pathways is a global model for breaking the cycle of poverty that provides South Africa’s most vulnerable children with an integrated support system of health, education, and household stability, from cradle to career.

In May of 2018, the Lipman Family Prize invited all past and current honorees the opportunity to join Lipman Program staff and guest faculty members to a curated learning opportunity. Entitled, **Growing What Works**, and sponsored by the McNulty Leadership Program and the Lipman Family Prize, the two and a half day conference supported the transfer of knowledge regarding the stellar models of our honorees all around the world.

Over the course of 2.5 days, the topics included

- Scaling Models
- Change Management
- Knowledge Management
- Learning Community Formations

Speakers included our own Jeff Klein and Umi Howard, Management Professor Martin Ihrig, Director of the Wharton Social Enterprise Program James D. Thompson and guests from our external consult partner, Spring Impact. 17 participants from eight honoree organizations attended the conference.



115+
applications



100+
countries



5
continents



\$1.575 Million
cash award to date

penn partnerships

penn athletics wharton leadership academy

28 coaches and administrators from 16 different Penn Athletic Teams

Now in the 3rd year of a 5-year pilot cycle and with the generous financial backing of David Pottruck, the Penn Athletics Wharton Leadership Academy curriculum included lectures, workshops, experiential sessions and more generated through the collaboration of the athletics department and Wharton.

In 2017-2018, incoming freshmen student-athletes from seven teams enrolled in the program. The focus was on the captains and the incoming freshman as they make the transition to college athletics and university life. Team captains and coaches participated in leadership development that created a culture where student-athletes and staff members shared a common vocabulary and worked symbiotically toward a common objective, in competition and beyond.

At the end of the 5-year pilot cycle, a dozen senior scholar-athletes who have distinguished themselves as leaders in the Leadership Academy will be named Pottruck Fellows. Upon receiving this honor, members of this fellowship program will commit themselves to mentoring Academy participants during the next three years.



What Dave Pottruck has identified so successfully with this program is that the culture of leadership inherent in a competitive team setting provides an excellent ‘laboratory’ for training future leaders. His gift enables us to adapt our integrated, experiential approach to leadership development, extending the work we have done with students, managers and executives at all levels to now include scholar-athletes.”

— Jeff Klein

penn veterinary partnership

36 participants including international C-suite leaders



We want to have an impact on the industry, but we also want to find out how to generate new knowledge. We’re still in the discovery phase, but our end goal is to design research projects that will fill knowledge gaps and help the Chinese swine industry.”

— Anne M. Greenhalgh & Thomas Parsons



In 2017, The Penn Vet-Wharton team applied for and secured a three-year grant for the delegation event from the Penn China Research and Engagement Fund (CREF). The delegation, hosted by Anne M. Greenhalgh of the McNulty Leadership Program in collaboration with Thomas Parsons of the University of Pennsylvania Veterinary School, included 36 participants, many of those international C-suite executives. Talks by Wharton’s Mike Useem and Harbir Singh, co-authors of Fortune Makers, were particularly well-received.

The Penn Veterinary Partnership focuses on developing an integrated training program for upper level managers and executives in the Chinese swine industry. The basic program will be repeated annually over a three year period in order to keep class size manageable yet accommodate as much of the Chinese swine industry leadership as possible. Each year a four-day training seminar will be held at the Penn Wharton China Center and then a subsequent five-day training program based at the Penn Vet Swine Center which will include visits to prototypical facilities in the US swine industry. The goal of this multi-site training program is provide both conceptual and hands-on experience for Chinese swine industry executives that focus on the different levels of opportunities for increased efficiency and improved sustainability that have driven success in the US swine industry. Each year two Penn Veterinary Students in the Food Animals Fellows program will be supported to conduct collaborative projects addressing opportunities for change within a sustainable model of the Chinese pork supply chain and help realize the improved efficiencies needed to feed a growing world population hungry for animal protein such as pork.

Once again, the McNulty Leadership Program partnered with the Penn Veterinary School by traveling to the Penn Wharton China Center to conduct the 2nd delegation of Chinese pork producers — representing three of the six largest pork producers in the country. This ongoing collaboration allows opportunities for partnership, exchange, and research.

Professor Thomas Parsons from the Penn Vet School served as the academic expert in the Swine Industry; Robert Ruth from Hatfield Farms served as the US industry expert; and Anne Greenhalgh, representative of the Wharton School and the McNulty Leadership program, used her facilitation skills to unpack case studies she wrote with Tom and Bob specifically for the leaders and managers of the Chinese swine industry.

In October 2018, a five day training program will be held in China, attended by the same 36 attendees.

leadership advisory board members

Established in 2004, the Leadership Advisory Board provides an essential link between the Wharton community and the foremost leaders in business, public service, government, entertainment, and sports. The board's mission is to provide support and advice on evolving and expanding the Leadership Center's and The Wharton School's leadership initiatives, to identify long-term directions and objectives for the initiatives, and to assist in securing financial support for the initiatives. We continue to be grateful for the support and service of our Board Members.



Deepak Advani, WG'98
Managing Director, Hellman & Friedman

Mr. Advani is the Managing Director of the private equity firm Hellman & Friedman, where he focuses on the Software sector. Before that he held several senior leadership roles at IBM, including General Manager of Commerce, General Manager of the Cloud and Smarter Infrastructure division, and the also led IBM's predictive analytics business.

From 2005 to 2009, Deepak was the Chief Marketing Officer and SVP of eCommerce for Lenovo. Before joining Lenovo, Deepak worked at IBM for 13 years where he held several global executive positions.

Deepak has an M.B.A. from the Wharton School of Business. He has an M.S. in Computer Engineering from Wright State University. He has a B.S. in Computer Science from Michigan State University. He serves on the board of Renaissance Learning and OpenLink. He also holds three patents in the software space.



Maria Bartiromo
Anchor and Global Markets Editor, FOX Business Network – FOX News Channel

Maria Bartiromo joined FOX Business Network (FBN) as Global Markets Editor in January 2014. She is the anchor of *Mornings with Maria* on FBN (6-9 AM/ET) and anchors *Sunday Morning Futures*, the most watched Sunday morning program on cable (10 AM/ET) on FOX News Channel (FNC). In April 2017, Bartiromo was named the new anchor for FBN's weekly primetime investing program *Wall Street Week* (Fridays at 8 PM/ET).

Bartiromo has covered business and the economy for more than 25 years and was one of the building blocks of business cable network CNBC. She has received numerous prestigious awards, including two Emmys and a Gracie Award. Her first Emmy was for her 2008 News and Documentary coverage of the 2007-2008 financial collapse and her "Bailout Talks Collapse" coverage was broadcast on NBC *Nightly News*. She later won a second Emmy for her 2009 documentary, "Inside the Mind of Google," which aired globally on CNBC. Bartiromo won a Gracie Award for "Greenspan: Power, Money & the American Dream," also broadcast globally on CNBC.

Bartiromo is a member of the Board of Trustees of New York University, the Council on Foreign Relations, the Economic Club of New York and the Board of Directors of The National Italian American Foundation (NIAF). She graduated from New York University, where she studied journalism and economics. She also served as an adjunct professor at NYU Stern School of Business for the fall semesters of 2010 through 2013.



Grant G. Behrman, WG'77
Co-Founder and Managing Partner, Behrman Capital

Grant Behrman is a founding Partner of Behrman Capital, a middle market private equity firm. He is actively involved in managing the Firm's investments and over time has served on the boards of

numerous portfolio companies in the Defense & Aerospace, Health Care Services and Specialty Manufacturing & Distribution areas. Previously, Mr. Behrman was a founding member of Morgan Stanley's principal investment activities where he worked from 1981 to 1991. From 1977 to 1981, Grant was a consultant with the Boston Consulting Group. An avid recreational runner, he has completed numerous marathons including the New York City, Boston and Comrades Ultra Marathon in South Africa.

Grant received his MBA with distinction from the Wharton School University of Pennsylvania (1977) and his BCom from the University of Witwatersrand (1973).



Randi Brosterman Hutchens, W'81, WG'88
Principal (Retired)
Deloitte Consulting LLP

Randi Brosterman Hutchens is a retired Strategy and Operations Principal (equity owner/ partner) from Deloitte Consulting (active until 2014). Randi is now an independent consultant, and executive

coach focused on leadership development. She specializes in coaching senior executives, as well as mentoring young professionals.

Randi spent 26 years in Deloitte Consulting's Financial Services Industry (FSI) practice, working with financial institutions in banking, securities, investment management, insurance, and credit ratings. Her main focus at Deloitte was helping clients to achieve Service Operations Excellence: strategy execution, business process improvement, and technology implementation.

Randi held a number of leadership roles within Deloitte, including leading Deloitte's mid-market Consulting FSI practice, Deloitte Consulting's risk management initiative within the Securities Industry, as well as various leadership roles within Deloitte's Women's Initiative and Deloitte's Parents Community. In her leadership roles, Randi focused on attracting, retaining and developing top talent at Deloitte, and fostering an environment of inclusion that develops skills in networking, mentoring, work/life

balance, and leadership development.

Prior to Deloitte, Randi was an Assistant Vice President with Citigroup in the North American Investment Banking Division designing and implementing securities processing systems.

Randi is a member of the board of directors, as well as a member of the executive committee of the board, of BioBridge Global, a San Antonio based nonprofit company that oversees and supports the South Texas Blood & Tissue Center, QualTex Laboratories, GenCure, and The Blood and Tissue Center Foundation. Randi is a member of the board of directors of Rapamycin Holdings, Inc., a San Antonio based for-profit company that is developing and commercializing a patented oral formulation of the drug Rapamycin for the prevention of cancer progression and recurrence.

Randi is a member of the board of directors of the Forté Foundation, a non-profit consortium of leading companies and top business schools working together to launch women into fulfilling, significant careers through access to business education, opportunities, and a community of successful women.

Randi spent 10 years as a member of the community board of the United Way of Northern Westchester, and was president of that organization for two years. Randi also served on the United Way of Westchester and Putnam de Tocqueville Steering Committee.

Randi is long-time member of the Financial Women's Association, and is a mentor to women professionals engaged in the FWA's Pacesetters leadership program. Randi has joined the Million Women Mentors, an organization focused on mentoring women and girls to pursue careers in the STEM professions.

Randi holds an MBA in Finance/Marketing and a BS in Economics, both from The Wharton School, University of Pennsylvania. Randi is a member of the Wharton Leadership Advisory Board, which provides support and advice to the Wharton School's McNulty Leadership Program. Randi is married and has 2 children who are currently in college.



Roger W. Crandall, WG'02
Chairman and Chief Executive Officer, Massachusetts Mutual Life Insurance Company

Roger W. Crandall is President and Chief Executive Officer of Massachusetts Mutual Life Insurance Company

(MassMutual), headquartered in Springfield, Mass. Prior to being named President and CEO on January 1, 2010, Mr. Crandall served as President and Chief Operating Officer.

Mr. Crandall first joined MassMutual in 1988, and spent the first 12 years of his career in the company's Investment Management Department. In 2000, he joined Babson Capital Management LLC, a MassMutual subsidiary. In 2002, he was named Managing Director at Babson Capital and head of the company's Corporate Bond Management, Public Bond Trading and Institutional Fixed Income units. In this role, he was responsible for overseeing all corporate credit related investments, including public and private bonds, bank loans, European bank loans, mezzanine and private equity investments, and structured credit products.

In June 2005, Mr. Crandall was appointed Chairman of Babson Capital and Executive Vice President and Chief Investment Officer of MassMutual. He was appointed Co-Chief Operating Officer of MassMutual in June 2007. In this role he was accountable for Babson Capital and two other MassMutual subsidiaries – Cornerstone Real Estate Advisers LLC and Baring Asset Management Limited – as well as MassMutual's Retirement Services, Retirement Income and Financial Products businesses. Mr. Crandall was named President and Chief Operating Officer in December 2008, at which point he joined the Board of Directors and also gained oversight of MassMutual's domestic insurance business – which includes the company's core product, whole life insurance – Enterprise Technology Organization and MassMutual International LLC.

Mr. Crandall, a Chartered Financial Analyst (CFA), is a graduate of the University of Vermont with a bachelor's degree in Economics. He earned his MBA from the Wharton School at the University of Pennsylvania.



William P. Egan, W'67
Founder and General Partner, Alta Communications

Bill is founder and General Partner of Alta Communications and Marion Equity Partners, Massachusetts-based venture capital firms. He founded

Alta's predecessor firm, Burr, Egan, Deleage & Co. in 1979, and has identified and backed several of America's leading growth companies in the information technology, life sciences, and communications industries. Prior to founding Burr, Egan, Deleage & Co., Bill was a Partner at TA Associates. He began his career as a Manager of Venture Capital for New England Enterprise Capital Corporation.

He is the past President and Chairman of the National Venture Capital Association, a former trustee of Fairfield University and the University of Pennsylvania and a former member of the Board of Overseers of The Wharton School. He is a member of the Board of CRH plc, and a number of privately held companies. Bill is also a trustee of the Isabella Stewart Gardner Museum and the Duniry Foundation.

Bill received a degree in Economics from Fairfield University and an MBA from The Wharton School.



Thomas P. Gerrity
Joseph Aresty Professor of Management, and Dean Emeritus, The Wharton School, University of Pennsylvania

Dr. Thomas P. Gerrity is the Joseph Aresty Professor of Management at the Wharton School. His research, consulting and teaching expertise is focused on

Leadership, Governance and Strategic Change management. Dr. Gerrity also served as the 11th Dean of the Wharton School for the nine years from 1990-99, leading Wharton through a period of highly recognized innovation and advancement.

Prior to coming to Wharton, Dr. Gerrity was the founder and Chief Executive Officer for 19 years of the Index Group (later named CSC Index), one of the world’s leading consulting firms in business reengineering, corporate strategy and information technology. He then served as the President of CSC Consulting, the Computer Sciences Corporation’s Professional Services Group, one of CSC’s three major divisions (and also the parent of CSC Index); he was at the same time overall Corporate Vice President of the Computer Sciences Corporation.

Dr. Gerrity currently serves on the Board of Directors of Sunoco Inc., PharMerica Corporation, Internet Capital Group, the Corporation of the Massachusetts Institute of Technology (MIT), and as Chairman of the Advisory Board for Arden Fund I, a real estate distressed assets investment fund.

A Rhodes Scholar in Economics at Oxford University, Dr. Gerrity received his Ph.D. in Management from the Sloan School of Management at the Massachusetts Institute of Technology (1970). He also earned his Bachelor of Science (1963) and Master of Science (1964) degrees in electrical engineering and computer sciences from MIT. Dr. Gerrity also taught courses for executives and MBA’s in Corporate Strategy and Management Information Systems at MIT’s Sloan School from 1968-1972.



Alex Gorsky, WG’96
CEO and Chairman, Johnson & Johnson

Mr. Gorsky is the CEO and Worldwide Chairman of Johnson & Johnson. Prior to this he was Vice Chairman of Johnson & Johnson’s Medical Devices and Diagnostics Group and a member of the Company’s Executive Committee.

Alex began his Johnson & Johnson career as a sales representative with Janssen Pharmaceutica in 1988. Over the next 15 years, he advanced through positions of increasing responsibility in sales, marketing and management and, in 2001, was appointed President of Janssen. In 2003, he was promoted to Company Group Chairman of Johnson & Johnson’s pharmaceutical business in Europe, the Middle East and Africa. Alex left Johnson & Johnson in 2004 to serve as the chief operating officer for Novartis Pharmaceuticals Corporation. In 2005, he was named head of Pharma North America and Chief Executive Officer for Novartis.

Alex returned to Johnson & Johnson in 2008 as Company Group Chairman and Worldwide Franchise Chairman for Ethicon. At that time, he also was appointed to the Surgical Care Group Operating Committee. In early 2009, he was appointed Worldwide Chairman of the Surgical Care Group and also was appointed to the Johnson & Johnson Executive Committee.

Alex holds a Bachelor of Science degree from the U.S. Military Academy at West Point, N.Y., and spent six years in the U.S. Army, finishing his military career with the rank of Captain. Alex earned a Master of Business Administration degree from The Wharton School of the University of Pennsylvania in 1996.

A longtime advocate of diversity and inclusion, Alex was named the 2009 Mentor of the Year by the Healthcare Businesswomen’s Association, an organization he has been involved with for many

years. During his tenure with Novartis, he established the Novartis CEO Award for Diversity and Inclusion. Currently, he is the Executive Sponsor of the Johnson & Johnson Women’s Leadership Initiative.

Alex serves on the board of directors of the Doylestown Hospital in Doylestown, PA. He and his wife, Pat, have a son, Nicholas.



Rodrigo Jordan
Founder and Chairman, Vertical S.A.
(Santiago, Chile)

Rodrigo Jordán is founding director of Vertical in Chile, an organization devoted to using the mountains as classroom for groups ranging from company managers to school children. He also directs Fundación Vertical, the non-for-profit arm of Vertical to serve the underprivileged students of the poorest schools in Chile.

Rodrigo is an accomplished mountaineer that has climbed throughout the Andes, summited Mt. Everest by the difficult east face in 1992, and led a Chilean team in 1996 in a successful ascent of K2. In 2002, he led a four-person team in an unsupported 250-mile traverse, much of it unexplored, of the Ellsworth Mountains in Antarctica. In 2006, he led a national team of 15 members to the summit of Lhotse, the world’s fourth highest mountain.

He received his doctorate in organizational administration from Oxford University, and he teaches Leadership and Decision Making in the MBA program of the Universidad Católica de Chile. Rodrigo was chosen to be the present chairman of the Chilean National Foundation for the Overcoming of Poverty, the most important NGO dealing with Poverty and Social Development today in Chile.



Rob Katz
Chairman of the Board of Directors and
Chief Executive Officer, Vail Resorts

Robert A. Katz is the Chairman and Chief Executive Officer of Vail Resorts. He has served as Chairman since March 2009. He served as Lead Director from June 2003 until his appointment as Chief Executive Officer in February 2006. He has served on the board of directors of Vail Resorts since 1996 and has been involved with the Company since 1991. Prior to becoming the Chief Executive Officer, Rob was associated with Apollo Management LLP, a private equity investment firm, since its founding in 1990. Rob currently serves on the Wharton Leadership Advisory Board and has previously served on numerous private, public and nonprofit boards.



Peggy Koenig
Managing Partner and co-Chief Executive
Officer of Abry, Inc.

Peggy Koenig is co-CEO and Managing Partner of ABRY Partners, LLC, which is a top ranked North American private

equity investment firm focused solely on investing in the media, communications, information and business services industries. ABRY has completed over \$62 billion of leveraged transactions and other private equity investments. The firm manages buy-out, growth equity and senior debt funds. Ms. Koenig joined ABRY in 1993 as a Partner when the firm organized its first \$250 million buyout fund. Ms. Koenig has been responsible for numerous transactions in the broadcasting (Nexstar Broadcasting, Citadel Communications, Connoisseur Communications), cable television (Avalon Cable, Wide Open West), consumer and business publishing (Network Communications, Cygnus Business Media, F+W Publishing), local media (Hispanic Yellow Pages), health care information (Knowledge Point 360), marketing services and logistics (Inmar) and business services sectors (Language Line).

Ms. Koenig is responsible for the oversight of the firm’s 71 employees, including 47 investment professionals. During her tenure she has initiated a myriad of professional development activities to enhance the firm’s employee base. She co-chairs the firm’s investment committee, and she is responsible for leading the firm’s fundraising efforts. During her tenure as co-CEO she has been responsible for raising nearly \$7.5 billion of capital.

Prior to ABRY, Ms. Koenig was a vice president, partner and member of the Board of Directors of Sillerman Communications Management Corporation, a merchant bank making investments principally in the radio industry. She participated in the formation and success of SFX Broadcasting, a radio industry consolidator. Earlier in her career, she was involved in motion picture financing (Columbia and TriStar Pictures), investment banking (Thomson McKinnon Securities), and the magazine publishing industry (*Savvy* and *American Photographer* magazines).

She is a member of the Board of Trustees of Cornell University, where she sits on the Finance, Building and Properties and Audit committees. She is a member of the Board of Observers of Cornell’s NY Tech Campus. She is a member of the Board of Trustees of the Boston Medical Center, where she chairs the Finance Committee and sits on the System board. She is also a member of the Massachusetts Women’s Forum.



Brian Kwait
Founder and Co-President, Odyssey
Investment Partners, LLC

Brian Kwait is one of the founders and Co-President of Odyssey Investment Partners, LLC a leading private equity investment firm with a 20+ year history of investing in middle market companies.

With offices in New York and Los Angeles, Odyssey has raised over \$5.0 billion of private equity capital, invested in over 40 platform companies and over 125 add-on acquisitions and is currently investing out of

the fifth fund, a \$2.0 billion vehicle raised in 2014.

Prior to forming Odyssey Investment Partners Mr. Kwait was a principal in the private equity investing group of Odyssey Partners a multi-strategy hedge fund.

Brian currently serves on the Boards of Integrated Power Services, Integro, Addison and Trialcard and his previous boards include Alliance Broadcasting, BarrierSafe Solutions International, Duravant, Norcross

Safety Products, LLC, One Call Care Management, Peninsula Packaging, Pexco, Pro-Mach, Safway Group Holding, United Site Services, Western Wireless and Williams Scotsman.

A native of Ohio, Mr. Kwait received his undergraduate degree from the Stephen M. Ross School of Business at the University of Michigan and his MBA at the Wharton School of the University of Pennsylvania.



William P. Lauder, W’83
Executive Chairman of the Estée Lauder
Companies, Inc.

William P. Lauder is Executive Chairman of The Estée Lauder Companies Inc., a global leader in prestige beauty.

Since joining the Company in 1986, Mr. Lauder has been instrumental in expanding the Company’s brand portfolio, distribution channels and international presence. Under his leadership, the Company pioneered its online business, developed successful new brands, such as Origins, and acquired pioneering brands, such as Aveda, Bobbi Brown, M A C, and Smashbox. Mr. Lauder was Chief Executive Officer of the Company from March 2008 through June 2009 and President and Chief Executive Officer from July 2004 through February 2008. From January 2003 through June 2004, he was Chief Operating Officer.

Mr. Lauder is a member of the Boards of Trustees of the University of Pennsylvania and an Emeritus Trustee on The Trinity School Board in New York City, his alma maters. He also serves as Chairman of the Board for the Fresh Air Fund and as Co-Chairman of the Board of the Breast Cancer Research Foundation. Mr. Lauder’s additional board memberships include The 92nd Street Y, The Kailash Satyarthi Children’s Foundation and Zelnick Media.

In 2012, Mr. Lauder was appointed to the faculty of The Wharton School of the University of Pennsylvania, where he teaches “Decision Making in the Leadership Chair,” a course he designed for second-year MBA students. He is the son of Mr. Leonard A. Lauder and Mrs. Evelyn H. Lauder, and the grandson of the Company’s founder, Mrs. Estée Lauder.



Eric Lane
Global Co-head of the Investment
Management Division, Goldman Sachs

Eric Lane is global co-head of the Investment Management Division (IMD) at Goldman Sachs. Previously, he was chief operating officer of IMD, where he had oversight for the Private Wealth Management, Alternatives, Capital Markets and Goldman Sachs Asset Management Distribution businesses.

Eric serves on the Management Committee and the Firmwide Client and Business Standards Committee (CBSC). He is also a member of the IMD CBSC and the Petershill Committee. Eric joined Goldman Sachs in 1996. He was named managing director in 2001 and partner in 2002.

Eric serves on the Board of Trustees of The Mount Sinai Medical Center, the Board of Trustees of The Chapin School and the Board of Directors of 92nd Street Y. Eric earned a BSE from the University of Pennsylvania.



Barry Lipman, W'70
Founder of the Barry & Marie Lipman Family Prize, Co-founder and Senior Partner, Goldfarb & Lipman

Barry Lipman is an attorney adviser and was senior partner from 1980 - 1998 at Goldfarb & Lipman, a law firm specializing in real estate. His nonprofit board

experience includes being a trustee of the Hamlin School from 1993-2002, Homeless Prenatal Program from 2005 - present, San Francisco University High School from 2003-2009, and the SF Zoological Society from 1995- 2011. He received his J.D. from UC Hastings, and his B.S. from the Wharton School at the University of Pennsylvania.

For more than 25 years, Barry Lipman (along with his wife, Marie), has served his San Francisco community as a philanthropist, board member, and a volunteer deeply involved in the social sector for more than 25 years. With sweat equity and strategic leadership they both have contributed directly to the sustainable growth of several nonprofits in the Bay Area. The Homeless Prenatal Program, San Francisco Zoological Society, and San Francisco Ballet are just three groups benefitting from the Lipmans' generous support.

A commitment to the greater social good is what led Barry, W'70, and Marie to create the Lipman Family Prize. The global nature of the prize and its focus on knowledge dissemination align perfectly with the institutional assets and goals of the University of Pennsylvania.



Vik Malhotra, WG'86
Chairman of the Americas and Senior Partner at McKinsey

Vik Malhotra is the Chairman of the Americas and a Senior Partner at McKinsey & Company. He is a member of the Firm's Board of Directors (where he Chairs the Governance & Risk Committee), leads our

Firm's Senior Partner Review Committee, and serves as Chairman of the McKinsey Investment Office (MIO). In the past, Vik has led McKinsey's Northeast Office (New York, Boston, Stamford) the East Coast Financial Institutions Practice, North American Life Insurance Practice, the North American Personal Financial Services Practice, and co-led the Emerging Markets Financial Institutions Practice.

Vik joined the Firm in 1986 and has spent his career in the New York Office. During his time at McKinsey, Vik Malhotra's consulting experience has covered a broad range of assignments on corporate strategy, business unit strategy, growth strategies,

performance transformation, organizational design, operational improvement, and business process offshoring.

Vik is also active with major non-profits outside McKinsey. He currently serves as the Chairman of the Wharton Graduate Board (University of Pennsylvania). He is also a Trustee of The New York City Partnership and a Trustee Emeriti of the Asia Society.

Before joining McKinsey, Vik Malhotra graduated from the Wharton School, University of Pennsylvania. Prior to receiving his MBA he worked at the accounting firm of Ernst & Whinney in London, England. Vik Malhotra received his undergraduate degree in economics from the London School of Economics in 1980.



F. William McNabb III, WG'83
Chairman and Chief Executive Officer, Vanguard Group

F. William McNabb III is president and chief executive officer of Vanguard, and chairman of the board of directors and the Vanguard funds' board of trustees. Mr.

McNabb has been with Vanguard since 1986, serving in several senior management roles and leading each of the Vanguard client-facing business divisions. In 2008, he was elected president and director of Vanguard by the board of directors and succeeded John J. Brennan as chief executive officer. He assumed chairmanship of the board of directors and the board of trustees on December 31, 2009.

Before his election as president, Mr. McNabb was managing director of Vanguard Institutional Investor Group and oversaw Vanguard's institutional and international businesses. He held that position since 2006 and was a managing director since 1995. Mr. McNabb is active in the investment management industry, having testified before the U.S. Department of Labor as well as the U.S. House of Representatives. He is also a member of the board of directors of the Zoological Society of Philadelphia.

Mr. McNabb earned an A.B. at Dartmouth College and an M.B.A. at The Wharton School of the University of Pennsylvania.



Anne Welsh McNulty, WG'79
Co-Founder and Managing Partner of JBK Partners

Anne Welsh McNulty (WG'79) is the co-founder and managing partner of JBK Partners, with businesses including investment management and a private philanthropic foundation which is focused

on leadership development and social change. Before starting JBK Partners, she was a Managing Director of Goldman Sachs and a senior executive of the Goldman Sachs Hedge Fund Strategies Group. Before starting JBK Partners, she was a Managing Director of Goldman Sachs and a senior executive of the Goldman Sachs Hedge Fund Strategies Group.

Under her leadership, the McNulty Foundation has established several initiatives that support individuals who strive to make a difference in the world in reaching their greatest potential. The McNulty Prize was set up in memory of her husband John to recognize the extraordinary success of young global leaders

solving some of the world's most intractable societal and environmental challenges. The McNulty Scholars programs at St. Joseph's University and Hunter College propel young women towards leadership roles in fields related to math and science. Anne has also spurred the creation of an Institute for Women's Leadership at Villanova University that will be launching in 2017.

In addition, she is a current member of the Board of Overseers at the Wharton School, a member of the Wharton Leadership Advisory Board, and a past member of the Undergraduate Executive Board. In addition to her leadership engagements at Wharton, Anne serves as a trustee of the Aspen Institute and the Naples Children & Education Foundation. She is a member of the Advisory Council for Harvard Kennedy School's Mossavar-Rahmani Center for Business & Government, and a member of the Board of Directors for the Child Mind Institute in New York, and the National Museum of American Jewish History in Philadelphia. She is a former Trustee at Villanova University, where she was valedictorian of her class.

Anne earned her MBA in Finance & Insurance from the Wharton School at the University of Pennsylvania after graduating from Villanova. She maintains strong connections with her alma maters and continues to serve as a role model to aspiring women leaders. Anne resides in Manhattan with her and John's three children; Johnny, Brynne, and Kevin, all proud graduates of the University of Pennsylvania.



John Popp, WG'82
Managing Director in the Alternative Investments branch of the Asset Management Division. Credit Suisse

John Popp is a Managing Director of Credit Suisse in the Alternative Investments business within the Asset Management division, based in New York. As the head of the Leveraged Investments Group in Alternative Investments., he served as a member on the Managing Director Evaluation Committee (MDEC) during 2005, and from 2007- 2009.

John joined Credit Suisse First Boston Asset Management in November 2000 through the merger with Donaldson, Lufkin & Jenrette, where he served in a similar capacity. Prior to that, he worked at First Dominion Capital, LLC as a Founding Partner, Chief Operating Officer and Head of Asset Management.

Previously, John worked simultaneously at Indosuez Capital as a Managing Director, at Indosuez Capital Asset Advisors, Inc. as President and at 1211 Investors as President. Before Indosuez, he worked at Kidder Peabody & Co., Inc. as a Senior Vice President in the corporate finance team, and before that worked at Drexel Burnham Lambert as a Vice President in mergers and acquisitions.

John holds a BA in History from Pomona College and an MBA in Finance and Marketing from The Wharton School of the University of Pennsylvania. John is a council member of The Brookings Institution and a member of The Juilliard School Council.



David Pottruck, C'70, WG'72
Chairman, Red Eagle Ventures and Co-Chairman, HighTower Advisors, LLC

Dave Pottruck is the Co-Chairman of HighTower, a \$14 billion nationwide wealth management firm. Mr. Pottruck was formerly President and Chief Executive Officer of The Charles Schwab Corporation, where he worked from 1984 until 2004.

In addition to HighTower, Mr. Pottruck serves on the Board of Directors of the Intel Corporation, and the U.S. Ski and Snowboard Team Foundation. Mr. Pottruck also serves Senior Advisor to Diamond Management and Technology Consultants, and serves as a Senior Fellow and adjunct faculty in the Wharton Center for Leadership and Change Management. Mr. Pottruck was formerly a Trustee of the University of Pennsylvania and Chair of the San Francisco Committee on Jobs.

Mr. Pottruck has received significant recognition by various organizations. He has been named one of the "Top 15 CEOs" by Worth; "CEO of the Year" by Information Week, "Executive of the Year" by The San Francisco Business Times; and "CEO of the Year" by Morningstar. Mr. Pottruck also received the Anti-Defamation League's 2000 Torch of Liberty Award.

Mr. Pottruck co-authored a "best seller" business book, Clicks and Mortar: Passion Driven Growth in an Internet Driven World. He was appointed by Congress and then President Clinton to serve as a commissioner on The Advisory Commission on Electronic Commerce.

Mr. Pottruck graduated with a BA from the University of Pennsylvania in 1970, and earned his MBA with honors from Wharton in 1972. A native of New York, Mr. Pottruck and his wife, Emily, reside in San Francisco. He is the father of three adult children.



Todd Thomson, WG'87
Founder & CEO Headwaters Capital; Chairman, Dynasty Financial Partners

Mr. Thomson is an accomplished operating executive, serving as Citigroup CFO for 5 years and as CEO of Citigroup's \$10 Billion (revenues) Global Wealth Management division. Mr. Thomson also is a leading

global practitioner and advisor on M & A and business strategy, having led the acquisition and strategy efforts over many years for Citigroup and GE Capital, as well as serving as advisor to dozens of Fortune 500 firms while at Bain & Co., Booz Allen Hamilton, and Barents Group.

Presently, Mr. Thomson is co-founder and Chairman of Dynasty Financial Partners, the leading investment and technology platform for sophisticated independent advisors.

He is also CEO of Headwaters Capital, where he structured and co-led the \$155 Million recapitalization of West Coast Bancorp (WCBO), which closed in November 2009. HWC also is a founder and investor in Cordia Bank, which acquired a majority interest in Bank of Virginia in 2010, and was sold to First Citizens Bank in 2016. HWC is a founding investor in Embody Fitness Gourmet, health and performance-oriented cafes. From 1998

through 2007, Mr. Thomson served in top management positions at Citigroup, including CFO of the company and CEO of the Global Wealth Management division. Throughout his 9-year tenure at Citigroup, Mr. Thomson served as a member of the most senior operating committees of the firm, the Citigroup Business Heads and Management Committees. He also was Vice-Chairman and a Director of Citibank, N.A.

Previously, Mr. Thomson was SVP Strategy and Acquisitions of GE Capital, Partner at Barents Group, and Manager at Bain & Co. In addition to serving as Chairman of the Board of Dynasty Financial Partners, Mr. Thomson is Lead Director of the Board of Cyren, LTD. He is a member of the Economic Club of New York and is Chairman of the Wharton Leadership Advisory Board. He is also a past member of the Board of World Resources Institute and the Board of Trustees of Davidson College.

Mr. Thomson received his M.B.A. with distinction, from the Wharton School of Business and his B.A. in Economics from Davidson College.



mcnulty leadership program faculty and staff



Mike Useem
William and Jacalyn Egan
Professor of Management;
Director, Center for Leadership
and Change Management

Michael Useem is Professor of Management and Director of the Center for Leadership and Change

Management at the Wharton School of the University of Pennsylvania. His university teaching includes MBA and executive-MBA courses on management and leadership, and he offers programs on leadership and governance for managers in the United States, Asia, Europe, and Latin America. He works on leadership development with many companies and organizations in the private, public and non-profit sectors. He is the author of *The Leader's Checklist*; *The Leadership Moment*; *Executive Defense*, *Investor Capitalism*, *Leading Up*, and *The Go Point*. He is also co-author and co-editor of *Learning from Catastrophes*; co-author of *The India Way* and *Leadership Dispatches*; and co-author of the forthcoming *Catastrophic Risk: How Corporate America Copes with Disruption* (Oxford University Press). Mike is co-anchor for a weekly program, *Leadership in Action*, on Sirius XM/Business Powered by the Wharton School (Channel 111)



Jeff Klein
Executive Director,
McNulty Leadership Program;
Lecturer, The Wharton School and the
School of Social Policy and Practice,
University of Pennsylvania

As Executive Director, Jeff leads the team that designs and delivers Wharton's

portfolio of curricular and co-curricular leadership development initiatives for undergraduate, MBA, and Executive audiences. He also directs the School's efforts to create the Penn Wharton Global Leadership Institute. HE is the co-host of *Leadership in Action* on Sirius XM/Business Powered by the Wharton School (Channel 111), and chairs the Steering Committee for the Penn Wharton Lipman Family Prize, an annual award of \$250,000 celebrating and supporting leadership and impact in social sector organizations.

Jeff is also the Executive Director of the Advanced Management Program, Wharton's flagship 5-week program for senior executives. Jeff's work with managers and executives in partnership with the Aresty Institute for Executive Education also includes Creating and Leading High Performing Teams and the Leadership Edge: Strategies for the Emerging Leader.



Anne Greenhalgh
Deputy Director,
McNulty Leadership Program
Adjunct Professor of Management,
Wharton 101

Anne M. Greenhalgh is Deputy Director of the Anne and John McNulty Leadership Program and also an award-winning

teacher. She is currently co-instructor of Wharton 101, the gateway course for in-coming students and the first step in the new requirement, "the leadership journey." She was voted the Best Lecturer in the Social Sciences by the entire student body at the University of Pennsylvania in 2005. She has also won the William G. Whitney Teaching Award for Associated Faculty on numerous occasions.

In addition to fulfilling her administrative and teaching responsibilities, Anne has served as an advisor and consultant to a number of academic and businesses institutions. As a Visiting Professor at City University, London, she was a member of the Vice Chancellor's senior management team and laid the foundation for the University's learning and teaching strategy. At Wharton Executive Education, she has facilitated sessions for a range of industries, including the Global Business Travel Association's custom program, the Athlete Development Professional Certification Program, the American Bankers Association (ABA), the Financial Industry Regulatory Authority (FINRA), the Security Industry Institute (SII), and Merck.

Anne's research projects reflect her dedication to leadership and management education. She is currently working on a grant funded by the TEAGLE Foundation, "*Redrawing the Map for Liberal Learning in the Undergraduate Business Curriculum: A Heterogeneous Exploration Addressing All stages of the Student Experience.*"



Wilma Alomar-Arroyo
Office Manager

Wilma coordinates finance and operations for the McNulty Leadership Program office. Before joining Wharton, Wilma worked at the University of Pennsylvania as a temporary employee and Delaware Investments (nka Lincoln

Financial Group), where she managed a team of seven retirement administrators, helped with marketing retirement products, involved with the annual tax reporting for retirement products, and handled ERISA and legal transactions for several retirement vehicles. She also served as a Spanish Translator for The Philadelphia Family Court (summer of 2006) where she prepared victims for their court hearings, volunteered at the Philadelphia VIP as paralegal and translator, and with the Philadelphia Bar Association translating for attorneys immigration clients.

Born in Salinas, Puerto Rico, and raised in Philadelphia, attended Pierce College for higher education receiving her Bachelor's degree in Paralegal Studies. She completed her Masters of Science in Legal Studies in the year 2016.



Erica R. Castillo
Business Administrator

Erica joined Wharton's McNulty Leadership Program this past July. Beforehand, she spent three years as a financial coordinator in Penn's School of Arts and Sciences. Previously, Erica worked in the private sector as an analyst with JPMorgan. She attended Temple

University, where she graduated with honors with a Bachelor of Arts degree in psychology. Erica currently resides in West Philadelphia with her husband, Mark, and her pets – Paris, Pablo, and Riley. She enjoys traveling, music, cooking, and reality TV.



Tia Dorsey
Financial Coordinator

Tia joined the Leadership Program team in September 2010 as Coordinator for Wharton Leadership Ventures. Tia manages financials, web development, and logistics within the Ventures program and works closely with Venture

Fellows and coordinators at the MBA level. Prior to coming to Wharton, Tia spent three years as an Academic Coordinator at Drexel University's College of Medicine, Biomedical Graduate Studies and also served as an Administrative Assistant at Girard College, a private boarding school in Philadelphia for academically capable students grades 1 through 12.

Earlier in her career, Tia served as the front line at Wharton's MBA Program Office for four years, greeting and supporting Wharton's graduate population and providing a friendly face for new and current students. Tia is excited to be back at Wharton working with energetic, brilliant MBA students. Tia is a Philadelphia native and a dedicated Eagles fan, who loves spending time with her family and friends.



Kate FitzGerald
Director, Marketing & Communications

Kate FitzGerald is a Director of Marketing & Communications and has been with Wharton since 2007. Kate is responsible for all marketing and communications activities across the Center, McNulty Leadership Program,

and the Lipman Family Prize. This includes development and implementation of a strategic marketing plan and overall brand identity for what will become the Wharton Global Leadership Institute. She oversees the ongoing maintenance of multiple media channels, the MLP and Lipman social media presence, and the photography and video creation needed to promote the brand and programs.

Kate holds a B.A. in Communications from the University of San

Diego, an M.A. in Marketing & Advertising from Emerson College and is currently pursuing a Master's of Organizational Dynamics from the University of Pennsylvania.



Sarah Goldsmith
Program Manager

Sarah proudly serves as a program manager on MBA leadership and talent development programming; supporting MGMT610, ECFP, and P3. With experience across institutional, corporate, commercial, and non-profit sectors; Sarah

joined the McNulty Leadership Program as a coordinator in 2017 and is eager to continue her work in the Wharton community.

Sarah returned to Philadelphia after earning her BA in Art and Art History at Bennington College in the foothills of Vermont's Green Mountains. Her undergraduate work focused on visual culture theory and criticism, and curatorial practice. She is especially passionate about progressive pedagogy, ancient divination, and mountain gorillas.



Emily Gunther
Program Manager, Nonprofit Board
Fellows Program

Emily serves as a Manager for the Nonprofit Board Fellows program and supports the McNulty Leadership Program's civic initiatives as well as business development. Prior to

Wharton, Emily spent over 10 years working at the intersection of sustainable agriculture, public health, and specialty food where she worked in nonprofit, small business and government settings.

In her quest to understand and improve our food system, Emily has farmed, bought, sold, imported, and worked on public policy for food and agriculture. She received her BA in Political Science and Spanish from Hamilton College and a MA in Geography and Urban Studies from Temple University. She is an amateur gardener, chef and cyclist.



Umi Howard
Director, Lipman Family Prize
Lecturer, School of Social Policy and
Practice,
University of Pennsylvania

Umi Howard joined the Wharton School in 2011 to establish and serve as Director of the Lipman Family Prize, an annual global competition that celebrates leadership and innovation in the social sector with an emphasis on impact and transferability of practices. He is also a lecturer and leadership facilitator through the McNulty Leadership Program.

Prior to joining Wharton, Umi spent fifteen years working in the social impact sector in a variety of roles, including running a

social enterprise, organizational consulting, curriculum design and instruction, philanthropy and board service. Umi is a graduate of Vassar College and received his Master’s from the University of Pennsylvania’s Graduate School of Education.



Lynn Krage
Director, MBA Leadership
and Talent Development

Lynn Krage is responsible for the development and implementation of leadership development programs for all audiences. She is also accountable for the design and delivery of the MBA Learning

Team Retreat and the Leadership Fellows program.

Prior to Wharton, Lynn was an Assistant Director for Student Leadership Development at Rennselaer (RPI), where she developed and taught required core courses in Professional Development and Managerial Leadership, designed and implemented leadership development programming for undergraduate and graduate students, provided training and development for faculty and staff.

Lynn holds a Master of Arts in Sociology from New York University and has completed a Certificate in Human Resource Management at the Wharton School as well as a Professional Human Resource Certification from the Society for Human Resource Management



Dan Kaufman
Associate Director, Nonprofit Board
Fellows Program

Dan is Associate Director for the Nonprofit Board Fellows, which selects and trains MBA and JD students to serve on nonprofit boards in the Delaware Valley.

Dan came to Wharton from Congreso de Latinos Unidos, where he directed college access programs for first-generation college students. Before Congreso, he taught and chaired the English department at LEAP Academy in Camden. He has previously served on the board of a youth mentoring nonprofit in North Philadelphia, and currently serves on the governance committee of First Person Arts.

He studied Rhetoric at Penn State, and earned a Master’s in Nonprofit Leadership at Penn’s SP2. He enjoys raising children, which is handy because he and his wife have two daughters who were born 18 years and 23 days apart.



Gwendolyn McDay
Associate Director, William P. Lauder
Wharton Leadership Fellows

As Associate Director of the William P. Lauder Wharton Leadership Fellows, Gwendolyn engages stakeholders at every level and across silos to operationalize cutting-edge leadership

content into experiential learning and service opportunities for Wharton MBA students.

Gwendolyn has over a decade of strategy and operations experience working for multi-national chemical companies as well as a stint with Deloitte’s chemicals and industrials practice. She ardently believes environmental sustainability will soon be the driver of innovation in how we build our world.

Gwendolyn has developed an economic development strategy for The Cleveland Foundation and sat on multiple non-profit boards. She holds a BS in Environmental Engineering Sciences from Yale University and an MBA from the Wharton School at the University of Pennsylvania, where she loved serving as a Leadership Fellow.



Tunisia Meek
Program Manager, Lipman Family Prize

Tunisia coordinates logistics and operations for the Lipman Family Prize. Prior to joining Wharton, Tunisia worked at the United Way of Greater Philadelphia and Southern New Jersey, where she provided administrative and operational

support for the Education Team in the Impact Department, helped to manage grant applications and reporting. She also served as a Special Projects Coordinator at The Philadelphia Tribune where she co-managed special events.

Born and raised in West Philadelphia, Tunisia stayed in her hometown for higher education receiving her Bachelor’s degree in English from Temple University. She is currently a member of the Steering Committee for the newly launched Philadelphia Black Giving Circle and hopes to continue her professional journey along the philanthropic path.



Erica Montemayor
Associate Director,
Wharton Leadership Ventures

Erica is Associate Director for Wharton Leadership Ventures and manages the Undergraduate Ventures and oversees the training and development of the Undergraduate Venture Fellows.

Erica joined the McNulty Leadership Program in November 2016 after working 8 years with Outward Bound. She has a vast array of outdoor and leadership experience in her roles as instructor, facilitator and staff trainer. She is passionate about experiential education and helping students discover themselves in unique environments.

Erica graduated from West Chester University with a B.A. in Psychology and is currently pursuing a masters degree in Organizational Dynamics from the University of Pennsylvania.



Megan O’Malley
Program Manager, Management 610
and Organizational Behavior Conference

Prior to joining the Wharton Leadership Program, Megan served as the Director on the Open Enrollment team at The Wharton School’s Aresty Institute of Executive Education. Her responsibilities

included the design, development, marketing, implementation and evaluation of a portfolio of executive education programs.

Megan graduated from Mount St. Mary’s College with a B.S. in Business Marketing. She grew up in Vineland, NJ and currently lives in the Art Museum area of Philadelphia with her husband, and their twin one-year-old daughters.



Tammy Rawls King
Business Administrator

Tammy Rawls-King is the Business Administrator for both the Leadership Program and Center for Human Resources. Tammy began her work in the MBA Program Office where she enjoyed working with students in a supportive

environment. She became interested in learning more about the academic departments and the fiscal operations at Wharton and worked as a Financial Analyst for the school in 2004. Shortly thereafter, Tammy transitioned to her current role as a Business Administrator, first for the Management Department where she managed the financials and budget activities and now focused on Leadership.

Tammy has a BA in Communications with a minor in Business from Temple University. She grew up in North Carolina and currently lives in Philadelphia with her husband Romeo, her daughter, Maja, and their puppy, Juicy.



Jules Roy
Associate Director, Wharton Leadership
Ventures

Jules is Associate Director for Wharton Leadership Ventures and is the principal manager of MBA Ventures and the Venture Fellow Development Program.

Jules joined the Leadership Program in March of 2015 directly after finishing a 22-year career as an Air Force Pararescue Jumper (PJ). He has served in most conflicts since the mid-90s and has led teams to locate and rescue or recover isolated personnel in highly contentious regions and often in the face of extreme environmental circumstances.

Jules earned a B.S. from the State University of New York with a capstone study in experiential education and he is currently pursuing a Penn Masters in Organizational Dynamics.



Jess Segal
Director, Strategic Initiatives

Jess develops and leads our strategic planning process and serves as the lead administrator for the Emotions Research initiative led by Sigal Barsade. Jess is also a core team member of the Advanced Management Program, where she focuses on the pre- and post- program participant

experience.

Prior to coming to Wharton, Jess served as the Assistant Director of External Relations for the Division of Business Services at Penn. She graduated magna cum laude from Indiana University of Pennsylvania with a BS in Marketing and earned her MS in Higher Education Management from Penn’s Graduate School of Education in 2008. Jess grew up just outside of Pittsburgh and currently lives in Jenkintown with her husband, Brandon and their daughters, Ella, Molly, and Quinn.



Samantha Stahl
Associate Director, Wharton Executive MBA

Samantha is responsible for the management, planning, and delivery of the Coaching and Feedback Program for MBA, MBA for Executives and Executive audiences. She also manages programing for the MBA for Executive audience.

Prior to joining the McNulty Leadership Program, Samantha served as Associate Director on the Open Enrollment team at The Wharton School’s Aresty Institute of Executive Education. Her responsibilities included the design, development, marketing, implementation and evaluation of a portfolio of leadership programs.

Samantha graduated from Susquehanna University with a B.A in Communications emphasizing in Public Relations and a minor in Art History. Samantha lives outside of Philadelphia with her husband Chris, their sons, Foster and Myron, as well as their other “children” Hattie the dog and Jack the cat.



Amanda Zimmerman
Associate Director, Undergraduate
Leadership Development

Amanda is responsible for the planning and management of the TA mentoring community for Wharton 101, the gateway course for all Wharton Undergraduates. In addition, she is responsible for developing relationships with regional organizations

and local Penn partners to cultivate case studies for the Wharton 101 student team projects and the creation of co-curricular programming.

Amanda joined the McNulty Leadership Program in 2014 as the Associate Director for the Leadership Fellows program. Her responsibilities included the management of student training, overseeing fellow selection, and creating a meaningful learning experience for the fellows and First-Year MBA community.

Previously, Amanda worked at McCombs School of Business at UT Austin. She received a BA in Communications from Penn State University and is currently pursuing her Penn Master’s in Organizational Dynamics.

senior fellows



Todd Henshaw
President, Leader Development Associates

Todd Henshaw teaches Executive Leadership Programs at Wharton. Prior to coming to Wharton, he was a Professor at Columbia University, and Academy Professor and Director of Leadership Programs at the United States Military Academy at West Point. A key architect of West Point’s Leader Development System, he also served as the inaugural Director of the Eisenhower Leader Development Program, a graduate partnership with Columbia University that prepares Army captains to develop future officers. At Wharton, Todd teaches leadership and leader development to both executives and MBA students, and consults with organizations desiring improvement in leadership at all levels. He has worked to enhance leadership capacity in numerous global organizations, including General Electric, Glaxo Smith Kline, Coca-Cola, Bao Steel, Kuwait Ministry of Finance, Huawei, IBM, Morgan Stanley, Bank of America, Novartis, Pense, McKinsey, Bain and McKesson and the National Military Academy of Afghanistan. He earned his MBA from The University of Texas at Austin, concentrating in Executive Leadership and Strategy, and a Ph.D. in Business at the University of Kansas, examining leadership development and organizational culture.



Ginny Hutchinson
Principal, Zero Point Partners

Ginny Hutchinson is a Principal at Zero Point Partners, a leadership and executive management consulting firm, serving the most extraordinary leaders, teams, and organizations in the world. As an inspirational leader, Ginny has successfully led start-up companies and corporate giants in the U.S. and Europe. She’s held the position as Chief Marketing Officer for Fortune 100 companies and now applies her global expertise at Zero Point Partners, a leadership consulting firm based in Jackson Hole, Wyoming. Presently, Ginny teaches at The Wharton School in the Executive Education Program and serves as a leadership consultant for world-class companies such as Johnson & Johnson, Arconic, U.S. Bank, Johnson Controls International and as an executive coach for individuals like World Champion snowboarder Travis Rice and others. Ginny is also the author of “Better Because of You” an inspirational book sharing how to make each day a little better — named Nordstrom Perfect Gift and featured in Forbe’s inspirational series on Leading a Positive Life. Ginny holds a BA from the University of Washington and lived in London for 5 yrs as CMO for several successful wireless start-ups. She’s avid snow skier, hiker, world traveler, and adventurer.

She dearly loves the outdoors, her community, and her family. Expertise: Leadership Development. Strategic Marketing. Business Results. High-Performance Teams. Executive Coaching. Communication & Decision Making.



Rodrigo Jordan
Founder and Chairman, Vertical, S.A. (Santiago, Chile)

Rodrigo Jordán is founding director of Vertical in Chile, an organization devoted to using the mountains as classroom for groups ranging from company mangers to school children. He also directs Fundación Vertical, the non-for-profit arm of Vertical to serve the underprivileged students of the poorest schools in Chile.

Rodrigo is an accomplished mountaineer that has climbed throughout the Andes, summited Mt. Everest by the difficult east face in 1992, and led a Chilean team in 1996 in a successful ascent of K2. In 2002, he led a four-person team in an unsupported 250-mile traverse, much of it unexplored, of the Ellsworth Mountains in Antarctica. In 2006, he led a national team of 15 members to the summit of Lhotse, the world’s fourth highest mountain.

He received his doctorate in organizational administration from Oxford University, and he teaches Leadership and Decision Making in the MBA program of the Universidad Católica de Chile. Rodrigo was chosen to be the present chairman of the Chilean National Foundation for the Overcoming of Poverty, the most important NGO dealing with Poverty and Social Development today in Chile.



John Kanengieter
Principal, Zero Point Partners

John Kanengieter is a guest lecturer and facilitator within various Wharton Executive Education programs. His practice focuses on building resilient leaders in any industry. John’s great passions in life are working with leaders, experiencing the outdoors, and laughing as much as possible. He is the principal of Kanengieter Consulting Group, a private organizational consulting firm that specializes in executive coaching, leadership and strategy solutions. He considers it a down-right privilege to work with the clients and partners in his practice.

He holds a Master’s degree in Applied Behavioral Science with an emphasis in Executive Coaching and Consulting in Organizations and specializes in executive coaching and working with teams in challenging and high-risk work systems. He is a keynote speaker, consultant, coach and trusted confidant. His work with leaders is augmented by his expertise gained from 25 years in the field of leadership development and experiential education. His practice includes clients as individuals, teams, and large organizations with an emphasis on building a system

of strong teams focused and aligned on clear strategies. John’s background on extended mountaineering expeditions gives him valuable experience that he now uses in his work. A teacher at heart, John is a principle trainer contracted by NASA to work with International Space Station astronauts in the dynamics of teamwork and leadership on extended space expeditions. He has developed leadership programs for the US Naval Academy, Fortune 50 corporations, government, and individuals in a slew of different industries.

For many years, John has served as the Director for Leadership at the National Outdoor Leadership School (NOLS) and also as a visiting instructor to the Ascent Institute, the Jempe Center and the Leadership Institute of Seattle. John lives in Jackson Hole, Wyoming, where he really enjoys riding his bike as fast as he possibly can.



Chris Maxwell
Former Adjunct Professor of Management, The Wharton School; Author of Lead Like a Guide

Chris Maxwell taught a course on leadership and teamwork at the University of Pennsylvania’s Wharton School for 15 years, and created and directed an experiential leadership development program that took him and over 200 participants and corporate sponsors to high peaks and challenging environments around the world.

From the summit of Wyoming’s dramatic Grand Teton to Iceland’s highest snow peak, to the wilds of Patagonia and far beyond, his team-based programs with world-class mountain guides have taught leadership lessons with lasting impact for leaders in both business and non-profit organizations. Chris earned a graduate degree in Applied Positive Psychology from the University of Pennsylvania, and holds a PhD in Public Administration from Penn State. He is a Senior Fellow of the Center for Leadership and Change Management at the Wharton School of the University of Pennsylvania.



David Pottruck, C’70, WG’72
Chairman, Red Eagle Ventures and Co-Chairman, HighTower Advisors, LLC

Dave Pottruck is the Co-Chairman of HighTower, a \$14 billion nationwide wealth management firm. Mr. Pottruck was formerly President and Chief Executive Officer of The Charles Schwab Corporation, where he worked from 1984 until 2004.

In addition to HighTower, Mr. Pottruck serves on the Board of Directors of the Intel Corporation, and the U.S. Ski and Snowboard Team Foundation. Mr. Pottruck also serves Senior Advisor to Diamond Management and Technology Consultants, and serves as a Senior Fellow and adjunct faculty in the Wharton Center for

Leadership and Change Management. Mr. Pottruck was formerly a Trustee of the University of Pennsylvania and Chair of the San Francisco Committee on Jobs.

Mr. Pottruck has received significant recognition by various organizations. He has been named one of the “Top 15 CEOs” by Worth; “CEO of the Year” by Information Week, “Executive of the Year” by The San Francisco Business Times; and “CEO of the Year” by Morningstar. Mr. Pottruck also received the Anti-Defamation League’s 2000 Torch of Liberty Award.

Mr. Pottruck co-authored a “best seller” business book, Clicks and Mortar: Passion Driven Growth in an Internet Driven World. He was appointed by Congress and then President Clinton to serve as a commissioner on The Advisory Commission on Electronic Commerce.

Mr. Pottruck graduated with a BA from the University of Pennsylvania in 1970, and earned his MBA with honors from Wharton in 1972. A native of New York, Mr. Pottruck and his wife, Emily, reside in San Francisco. He is the father of three adult children.



Gregory Shea
Adjunct Professor of Management; Adjunct Senior Fellow, Leonard Davis Institute of Health Economics; The Wharton School

An award-winning teacher, consultant and author of numerous books on leadership and change, Gregory Shea’s expertise covers organizational and individual change, group effectiveness, and conflict resolution. For over 30 years, he has consulted extensively with senior organizational leaders of companies facing change in industries including telecom, manufacturing, power, digital technologies, financial services and health care. At Wharton Executive Education, Greg leads program integration in Leading and Managing People, Leading Organizational Change, The Leadership Journey: Reimagine Your Leadership, and LIMRA Leadership Institute Fellow Designation Program. A member of the Academy of Management and the American Psychological Association, Greg’s writing has appeared in such journals as Sloan Management Review, Journal of Applied Behavioral Science, Journal of Conflict Resolution, and British Journal of Social Psychology.



Elizabeth Vale
Senior Fellow; Former Executive Director, White House Business Council

Elizabeth Vale is currently a Senior Managing Director at Promontory Interfinancial Group working with corporate clients. Previously, she served as a Senior Advisor and the Business Liaison for Elizabeth Warren’s Senate campaign. She was responsible

for strategizing, designing, and executing the campaign’s engagement with the business community throughout Massachusetts and nationally. Previously, Elizabeth served as the Director of the Division of External Affairs at the Consumer Financial Protection Bureau (CFPB), where she had primary responsibility for the Bureau’s engagement with Capitol Hill; the media; consumer groups; local, state, and international governments; and the business community. Prior to being named Director of External Affairs, Elizabeth was a Senior Policy Advisor to Elizabeth Warren on the CFPB’s Implementation Team. In this capacity, she served as the liaison to community banks, credit unions, and small businesses.

Elizabeth served previously as the White House Business Liaison and Executive Director of the White House Business Council. She coordinated a consistent White House message to and from the business community across 12 federal agencies.

Prior to her career in public service, Elizabeth was a Managing Director at Morgan Stanley. She has 22 years of investment experience. Before joining Morgan Stanley, she was a Vice President and portfolio manager at Philadelphia National Bank, now part of Wells Fargo. Earlier in her career, Elizabeth was a Legislative Assistant in economic policy for Senator John Heinz, supporting his work on the Senate Banking and Finance Committees.

Elizabeth received an A.B. cum laude in government from Harvard University and studied at the London School of Economics. She holds the Chartered Financial Analyst (CFA) designation.



Ilene Wasserman
Wharton Executive Education; President,
ICW Consulting Group

Ilene Wasserman has over 30 years of experience in Organizational Consulting, Strategic Planning, Change Management, Leadership Development, and Executive Coaching. As founder and president of ICW Consulting Group, Ilene helps leaders and teams throughout organizations leverage multiple dimensions of domestic and global diversity by enhancing communication and collaboration. Ilene has served as an executive coach with senior executives and boards of directors of Fortune 100 companies, socially responsible businesses, health care institutions, and institutions of higher education. In addition to consulting and coaching, Ilene has taught courses in leadership, organizational consulting, leading diversity, organizational communication, emotional intelligence and cultural competence, and group dynamics at the graduate level. She is a member of the Board of Governors of the Center for Creative Leadership, and a Fellow of both the Taos Institute and The Lewin Center. She also serves on the Boards of the CMM Institute and the Public Dialogue Consortium, and is a Member of NTL.



Joseph Westphal
Former U.S. Ambassador to Saudi Arabia;
Former Undersecretary of the Army

Joseph Westphal is the former U.S. Ambassador to Saudia Arabia and former Under Secretary of the Army. He has had a distinguished career of service in both academia and government. He served as Chancellor of the University of Maine System and Professor of Political Science at the University of Maine. He also served as the Provost, Senior Vice President for Research, and Professor of Environmental Studies at The New School in New York City. Joseph stepped down from this position to serve as a member of President Obama’s Transition Team for Defense matters in December 2008.

He spent his first 12 years in academia as a faculty member of Oklahoma State University, where he was a Professor of Political Science, later becoming head of the Department. During his many years of public service, Joseph has lectured at numerous universities around the world and taught public policy as an Adjunct Professor at Georgetown University while working in Washington, D.C. In 2001, he served as the Acting Secretary of the Army and earlier he served as the Assistant Secretary of the Army for Civil Works from 1998-2001. He has had extensive experience working in the U.S. Congress and other departments within the executive branch. Joseph served as the Senior Policy Advisor for Water Resources at the U.S. Environmental Protection Agency during the Clinton Administration. He also worked in the U.S. Congress in various capacities, including directing a bi-partisan congressional caucus in the House and Senate and as a budget analyst and assistant to the Chair of the U.S. House Committee on the Budget. Earlier in his career, he worked as a policy advisor to the Secretary in the Department of the Interior.

Joseph received his Bachelor’s degree from Adelphi University, his Master’s degree from the Oklahoma State University, and his Ph.D. in Political Science from the University of Missouri-Columbia.

upcoming events

February Leadership Advisory Board Meeting

Feb 26-27

Alumni Day

May 18

Howard Marks, W'67 book release event

Oct 10

Wharton Global Alumni Forum: Shanghai

Mar 7-9

MBA Graduation

May 19

Wharton Leadership Lectures with Marc Lore

Oct 1

8th Annual Lipman Family Prize Award Ceremony

End of April

University Graduation

May 20

Authors@ Wharton Speaker Series with General Stan McChrystal

Nov 1

Wharton Global Alumni Forum: London

Jun 27-28



annual leadership stewardship report

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Leadership Center

