



annual leadership report

2018-2019

leadership.wharton.upenn.edu

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UPCOMING EVENTS



leadership team

[letter]

2018 - 2019

Board Members, Partners, and Friends,

We are pleased to share with you our annual stewardship report for the 2018-2019 academic year. We began this year by leading the first-year MBAs through pre-term and introducing WH101, the first step of the new requirement, The Leadership Journey to Wharton freshman. This year also saw two new classes of executive MBAs, two classes of Advanced Management Program (AMP) for Executives, and the launch of the China AMP. We concluded the year with the 8th annual Lipman Family Prize Award Ceremony and the 23rd Annual Leadership Conference, entitled “*Leading in a Context of Conflict*.”

In the following pages, you will find highlights of the four main audiences we serve – undergraduate, graduate,

executive MBA, and executive—and snapshots of the McNulty Leadership Program, the Center for Leadership and Change Management, and the Barry & Marie Lipman Family Prize.

We invite you to read this report with care – in more than one sense of the word. We depend on your shrewd guidance and heartfelt advice as we strive to design top-quality programming, to deliver it with compassion, and to build lifelong learning communities for the students and participants we serve.

With best regards,

Mike Useem
Director
Center for Leadership
and Change Management

Jeff Klein
Executive Director
McNulty Leadership Program

Anne Greenhalgh
Deputy Executive Director
McNulty Leadership Program

mcnulty leadership

[program overview]

At the McNulty Leadership Program (MLP), 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, as well as 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 community-wide programs like the Authors@Wharton Speaker Series and the Executive Coaching and Feedback Program or open enrollment programs like Ventures and P3: Purpose, Passion, and Principles to our many fellowship and student groups, we work to give students and executives opportunities to:

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

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

EXPERIMENT: By accepting stretch experiences, our 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 their classroom in to deliberate practice, our 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

Infographic taken from the Wharton School More than Ever Campaign



**INCUBATE
IDEAS TO
TRANSFORM
BUSINESS**



**POWER INSIGHTS
TO REINVENT
DECISION MAKING**



**CREATE LEADERS
WHO CHANGE
THE WORLD**



66
leadership
development
opportunities



7
fellowships and
student groups



245+
partnerships



Students participate on a Wharton Leadership Venture

strategic initiatives

Knowing that self-reflection and evaluation are vital components for effective leadership and organizational success, the McNulty Leadership Program created a set of five working teams in May 2019. Comprised of four or five staff members, these working teams meet regularly to brainstorm, research, and provide recommendations for five internal strategic initiatives. Each initiative's charter is outlined below:

One Student, One Fellowship

- Examine self and others to identify criteria for selection, and the scaffolding that supports a McNulty fellowship.
- Learn from findings, identify commonalities, and highlight the necessary differences.
- Recommend initiatives that will boost collaboration within and between fellowships. Create synergies, efficiencies, and a high standard of excellence.

Green Operations

- Renew Green Office certification and achieve a level 4 status.
- Assess and amend purchasing power and create a standard product list to share with the team.
- Create an MLP Catering Standard to share with our top catering partners.

Marketing/Branding

- Evaluate opportunities for increased brand awareness of our programs to student audiences.
- Link all programs to MLP by way of event signage and social media badges.
- Create a survey asking students to select their programs of interest and use data for targeted pushes during recruitment times.

People Lab

- Design launch and dissemination of the People Lab survey/report to the incoming MBA Class of 2021.
- Coordinate the integration of the People Lab survey with MLP 360 to streamline communication and the student experience.
- Identify key milestones and necessary considerations for successful delivery to students and training of Leadership Fellows (LFs) and coaches.

Women's Leadership Initiatives

- Evaluate opportunities and challenges within Wharton regarding gender equity.
- Advance the creation and promotion of women's leadership programming initiatives with MLP.



conferences and speakers

Authors@Wharton Speaker Series

Launched in 2012 by Professor Adam Grant, Saul P. Steinberg Professor of Management, the Authors@Wharton Speaker Series is delivered by the McNulty Leadership Program and has quickly become one of our most popular and well-attended programs. We bring world-renowned speakers to campus with the intention of enriching intellectual engagement and encouraging dialogue between students, faculty, staff and alumni. We have had authors from a variety of industries, ranging from more traditional business and management to sports,

entertainment, and current affairs.

Every year, we select 16 students to serve on the Authors@Wharton Student Committee. MBA and Undergraduate students serve on this committee for one year, and assist with speaker selection, event management and marketing and stewarding guests during their time on campus.

During the 2018-2019 academic year, there were five Authors@Wharton events. See chart below:

Authors@Wharton Speaker Series

Author	Industry	Book	Date/Location	Attendance	# of Book Giveaways	Special Guests
Stanley McChrystal	Retired 4-star General	Leaders: Myths and Reality	November 1, 2018 Huntsman Hall		100	Wharton Veterans Club AMP Participants
Ingrid Fetell Lee	IDEO Fellow and Ted Talk Star	Joyful: The Surprising Power of Ordinary Things to Create Extraordinary Happiness The Next Big Idea Club (thought leader book club)	November 28, 2018 Steinberg- Deitrich Hall	175	100	
Doug Pederson	Philadelphia Eagles Football Coach	Fearless: How an Underdog Becomes A Champion	March 21, 2019 Annenberg Theater	425	250	Dean Geoffrey Garrett UPenn Football Team and Coaches
Valerie Jarrett	Former Senior Advisor to President Obama	Finding my Voice: My Journey to the West Wing and the Path Forward	April 3, 2019 Irvine Auditorium	353	200	Elizabeth Vale Center for High Impact Philanthropy ECFP Coaches
Melinda Gates	Philanthropist and Global Advocate for Women and Girls	The Moment of Lift: How Empowering Women Change the World	April 25, 2019 Irvine Auditorium	780	200	President Amy Gutmann Lipman Family Lipman Family Prize Honorees/School of Public Policy Nonprofit Leadership Students/ AMP participants



Former Pepsi-Cola President and Former Apple CEO John Scully speaks to students as part of Wharton Leadership Lectures



Former Obama Advisor Valerie Jarrett with members of the Authors@Wharton Student Committee

Wharton Leadership Lectures

In partnership with the Dean's office, the McNulty Leadership Program supports the delivery of Wharton Leadership Lectures. These lectures provide a forum for the most senior executives from the public and private sectors to address pertinent leadership issues and share their insights with the entire Wharton community. The lectures have featured many of the world's most influential leaders and policy-makers with topics ranging from telling the story of a path to leadership, industry-specific leadership examples or discussions of the various challenges CEOs can face in their line of work. During the 2018-2019 academic year, there were three Leadership Lectures.

Speaker	Date	Title/Industry
Marc Lore	October 1, 2018	Chairman and CEO, Walmart eCommerce U.S.
Beth Comstock	October 24, 2018	Former Vice Chair and CMO, GE
Amity Millhiser	March 26, 2019	Chief Clients Officer, PWC U.S.

Leadership Conference

The theme of the 23rd annual Wharton Leadership Conference was *"Leading in a Context of Conflict"*. In today's business environment, leaders are faced with rising demands for greater accountability and the need to tackle social issues. Technology adds to the tension as the job market increasingly shifts toward automation. At the 23rd Wharton Leadership Conference, the distinguished speakers included CEOs from telecommunications, insurance, and finance; a former NSA director and admiral, a state governor, a talent specialist at a major professional services firm, a business diversity expert, and others. They shared how they have steered through this environment of conflict to achieve notable success in their chosen fields.

Speaker	Industry	Presentation Title
Ron Williams	Aetna CEO	Giving Your People a "Clear and Elevating Goal"
Ivan Seidenberg	Former CEO, Verizon	A Journey from the "Phone Company" to the Technology Business
Mark Turner	Executive Chairman, WSFS Bank	Disrupt Your Team, Disrupt Yourself
F. William McNabb III	Former Chairman and CEO, Vanguard	
Jeb Bush	Former Governor, Florida	Setting "Big Hairy Audacious Goals"
Rahul Varma	Consulting	The Obligation to Re-Skill Your People
Judith Rodin	Former University of Pennsylvania President and Former Director of the Rockefeller Foundation	
Admiral Mike Rogers (Retired)	The Former Director of the NSA and Commander of the U.S. Cyber Command	"Never Let a Crisis Go to Waste"
Stephanie Creary	Wharton Assistant Professor of Management	Why Diversity Isn't Enough

Former Florida Governor Jeb Bush speaking at the 2019 Leadership Conference.



Audience member asking a question at the 2019 Leadership Conference

undergraduate

UG

undergraduate: UG

KEY UG, MBA, EMBA, EE,
Public, Interdisciplinary

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 committee plays an integral role in suggesting potential speakers and topics and managing events.

UG, MBA

Executive Coaching and Feedback Program

This program is a unique opportunity for students to get personalized one-on-one executive coaching based on detailed feedback from peers and former co-workers.

MBA, EMBA, EE

Learning Team Experience

During two days in early August, first-year MBA students are introduced to their Learning Teams and begin the process of team formation.

MBA

Leadership Conference

An annual conference featuring distinguished speakers in top leadership roles across industries.

UG, MBA, EMBA, EE, Public

William P. Lauder Leadership Fellows

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

MBA

Leadership in Action on Sirius XM

This is a weekly radio show with a live, call-in format featuring guests from diverse industries.

UG, MBA, EMBA, EE, Public

Lipman Family Prize Fellows

Fellows help plan and execute elements of the Lipman Family Prize award process. Fellows review applications, analyze data, and prepare materials for the Prize Committee.

MBA, Interdisciplinary

Management 610: Foundations of Leadership and Teamwork

The first core course of the MBA curriculum, MGMT610 is an intense immersion experience, including a custom-designed, team-based, and highly interactive simulation.

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

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, MLP supported

P3 Group Facilitators

Seasoned veterans of the program facilitate group conversations over the eight-week curriculum.

MBA

Undergraduate Venture Fellows

Undergraduate students create an environment for individual and team leadership development on a specific Leadership Venture.

UG

Venture Fellows

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MBA

Ventures: Expeditions and Intensives

Through Wharton Leadership Ventures, participants are able to step out of their comfort zone, exceed personal limitations, and experience leadership first hand.

Expeditions and Intensives are outdoor, experiential treks that provide genuine environments of uncertainty and change.

UG, MBA, EMBA, EE

Wharton 101: Business and You

This course helps students understand the interrelatedness of business fields and disciplines and acquire a stronger sense of themselves.

UG

Wharton 101 TAs

Upper level students who help deliver the Freshman Gateway Course.

Workshops One to three day programs that focus on various leadership competencies.

UG, MBA, EMBA, EE

undergraduate

[overview]

“Both the Wharton 101 TAs and WLV have offered me training, and experiences that have helped me learn and grow as a person. More importantly, these fellowships/ organizations give me an outlet to give back and teach/ help people with the skills and experiences that I have been given.”

— Ryan Pruitt, W'19, Undergraduate Wharton 101 TA and Leadership Venture participant

“The Leadership Ventures were the pathways through which I made some of my closest friends and best memories. They taught me leadership, compassion, and the benefit of learning by doing and learning by listening to those around you - and how to have an amazing time while doing it!”

— Maddie Dalzell, W'19 Two-time Leadership Venture Participant, Glassblowing and Equine Workshop participant, *Authors@Wharton Speaker Series* Attendee, MGMT 101

The leaders of tomorrow begin their journey to changing the world in the McNulty Leadership Program’s undergraduate program. Wharton Undergraduates embark on the Leadership Journey, an academic requirement that spans all four years. Incorporating half-credit modules, the Journey gives students the opportunity to learn about themselves, build skills, and gain business acumen. By the time they graduate, students are better equipped to excel as leaders throughout their careers.

A Leadership Journey Integrated Over Four Years



Undergraduate Ventures

This year, the Undergraduate Ventures program ran five Expeditions, four Intensives and four Workshops to diverse locations all around the globe. Facilitating self-discovery, leadership, and character development, Leadership Ventures enable our undergraduate students to step out of their comfort zone, exceed personal limitations, and experience leadership firsthand. These immersive programs provide a set of engaged, hands-on experiences for exploring and mastering the capabilities for effective individual and team leadership in business and beyond.



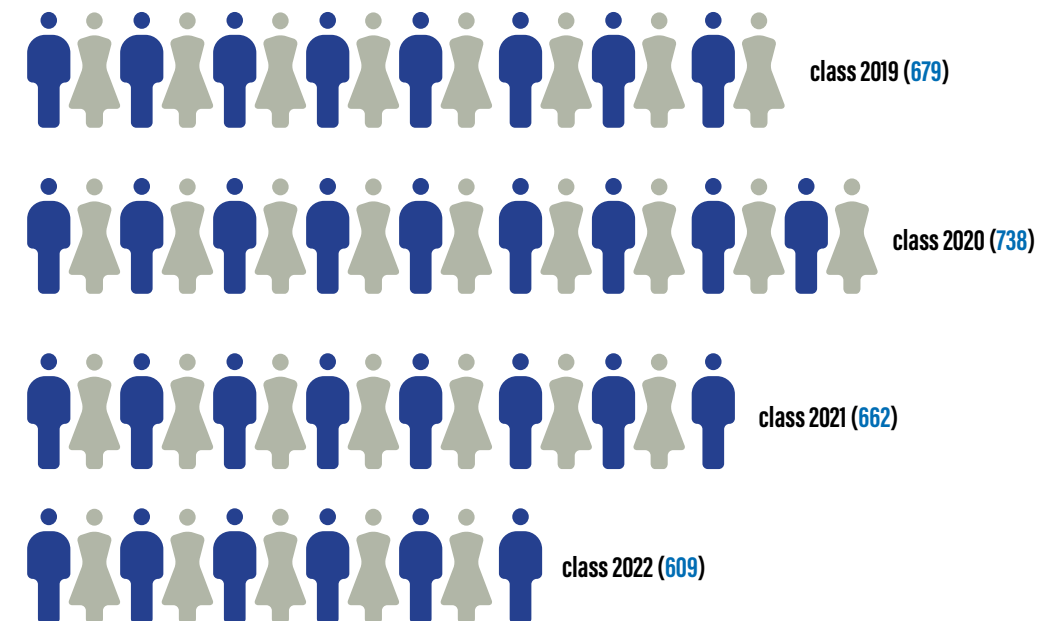
196
open-enrollment opportunities



9
leadership ventures



3
fellowships & student groups



PROGRAM	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	SEATS FILLED	OPPOR-TUNITIES
Wharton 101													646	1
WLV Expeditions													36	4
WLV Intensives													74	4
UG Workshops													37	3
Wharton 101 TAs													36	1
Venture Fellows													26	1
A@W Committee													4	1
TOTALS													863	15



Undergraduate students participate in a one-day sailing intensive in the Chesapeake Bay

We have two student leadership programs within the Undergraduate program — Wharton 101 TAs and Undergraduate Venture Fellows. These opportunities are merit-based and are intended for students looking for authentic service positions. Undergraduate students engaged in these two programs receive customized leadership training and elevated peer-membership roles.

Wharton 101 TAs

Upper level students serve as Wharton 101 TAs and help deliver the Freshman Gateway Course. TAs in this service role help develop the leadership capacity of fellow students through action and reflection.

Undergraduate Venture Fellows

Venture Fellows are carefully selected sophomores, juniors, or seniors who serve as student leaders and help with Venture marketing efforts, conduct pre-trip information sessions and activities. The Fellows serve as coaches and facilitators on Ventures and/or Intensives and help collect feedback after the ventures to ensure continuous improvement of the program.



Wharton 101s connect at an alumni event in New York City

mba

MBA

MBA: MBA

KEY

UG, MBA, EMBA, EE,
Public, Interdisciplinary

Authors@Wharton Speaker Series

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UG, MBA, EMBA, EE, Public

Authors@Wharton Student Committee

The committee plays an integral role in suggesting potential speakers and topics and managing events.

UG, MBA

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UG, MBA, EMBA

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MBA, Interdisciplinary

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MBA, EMBA, MLP supported

P3 Group Facilitators

Seasoned veterans of the program facilitate group conversations over the eight-week curriculum.

MBA

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UG, MBA, EMBA, EE

Wharton 101: Business and You: This course helps students understand the interrelatedness of business fields and disciplines and acquire a stronger sense of themselves.

UG

Wharton 101 TAs:

Upper level students who help deliver the Freshman Gateway Course.

Workshops One to three day programs that focus on various leadership competencies.

UG, MBA, EMBA, EE

“I achieved my goal of a 360 leadership development program during my 2 years at Wharton. I set goals and identified development areas with my Exec Coach during the first year that I was then able to implement and try out with my 1Y classmates as a Leadership Fellow. I also enjoyed learning lessons from industry thought leaders first-hand as part of the Authors@Wharton committee, hearing about leadership applied in corporate and non-traditional settings, and will carry these lessons forward throughout my career.”

— Anant Shukla, WG'19 Executive Coaching and Feedback Program, Leadership Fellow, Authors@Wharton Student Committee, Mindfulness Workshop participant

Wharton’s MBA students are introduced to the McNulty Leadership Program in Pre-Term of their first year. From that point onward, the Program serves as a fundamental force in shaping their time at Wharton. 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 MGMT610 course ends, students move into their first semester.

Various information sessions are held throughout the semester to provide students the opportunity to hear about our co-curricular and fellowship programs. In total, MBA students are able to choose from 30 unique leadership development opportunities with the McNulty Leadership Program – ranging from Fellowships to Ventures to the Authors@Wharton Speaker Series.

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



enroll in 1 program

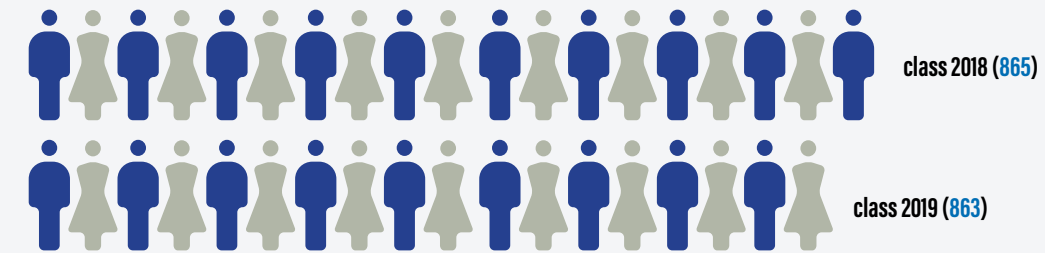


enroll in 2 programs



enroll in 3 programs

CLASS SIZE FOR 2018-2019 YEAR



PROGRAM	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	SEATS FILLED	OPPOR-TUNITIES
MGMT 610													864	1
MGMT 896													50	1
ECFP													275	1
P3 Groups													388	1
Expeditions													218	10
Intensives													228	4
Workshops													257	8
Leadership Fellows													48	1
Lipman Fellows													16	1
Nonprofit Board Fellows													43	1
Venture Fellows													28	1
A@W Committee													4	1
P3 Facilitators													67	2
TOTALS													2486	33

Curricular Initiatives
 Open Enrollment Programs
 Fellowships + Student Groups

one student, one fellowship

New for the 2018-2019 academic year and specific to MBA students, the One Student One Fellowship (OSOF) policy maximizes the number of seats in our fellowship programs, which turn maximizes the number of students who can participate in our leadership development opportunities. Past student feedback from the MBA Program Office annual stakeholder survey and an internal survey conducted by the MLP office indicated a preponderance of student support for piloting this change in policy.

OSOF applies only to the four McNulty Leadership Program fellowships, comprising the Nonprofit Board Fellows, Venture Fellows, William P. Lauder Leadership Fellows, and Lipman Prize Fellows, and adheres to the following guidelines:

- Students **may** apply to more than one fellowship.
- Students **may** be offered a position in more than one fellowship.
- Students **may not** accept more than one fellowship.

Fellows from the Wharton School can participate in other Leadership programming (such as P3, Executive Coaching and Feedback Program (ECFP), Authors@Wharton, Leadership Ventures, etc) and serve as fellows in other departments (such as Admissions and Student Life).

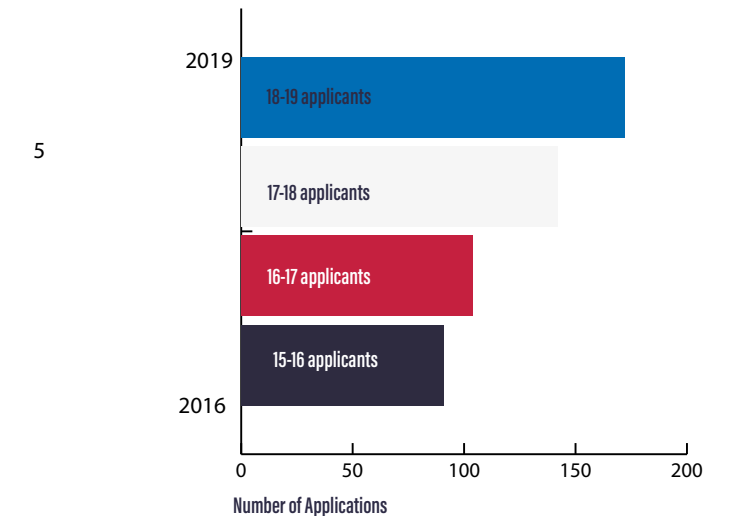


MBA Fellowships

The McNulty Leadership Program offers four fellowship programs, each with its own set of requirements and development opportunities. All four share a common commitment to the growth and development of fellow students through the process of action and reflection in service to the Wharton, Penn, Philadelphia, or global community. With the adoption of our “One Student, One Fellowship” pilot in the 2018-2019 academic year, MBA students can serve in only one role and, in this way, expand the pool of fellows.

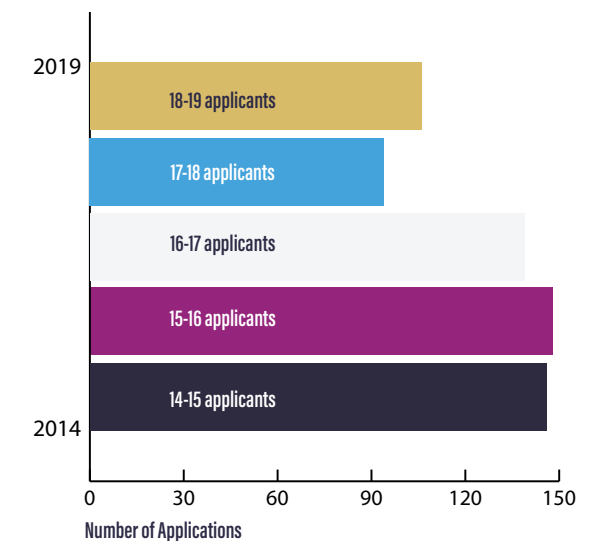
Lipman Family Prize Fellows

These fellows help with analysis and review of global organizations for the Lipman Prize. Lipman Family Prize Fellows help plan and execute elements of the award process. Fellows are recruited from all of the Penn graduate schools and review applications, analyze data, prepare materials for the Prize Selection Committee and help with the award ceremony where the winner is announced.



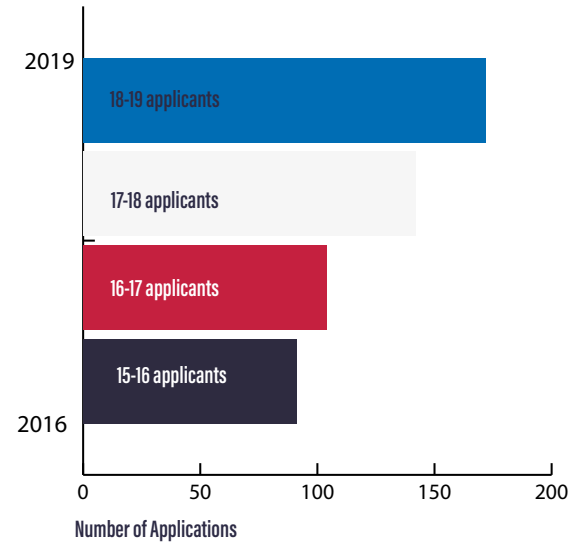
Nonprofit Board Fellows

These fellows serve as “Visiting Board Members” and gain valuable board experience with the partner organization. Nonprofit Board Fellows match Wharton MBA and Penn Law JD students with Philadelphia area nonprofit organizations and is a unique opportunity for graduate students to get involved in the Philadelphia community. Students serve in the role of an “apprentice” for one year and participate in on-campus trainings and meetings aimed at supporting their development in the apprentice board member role.



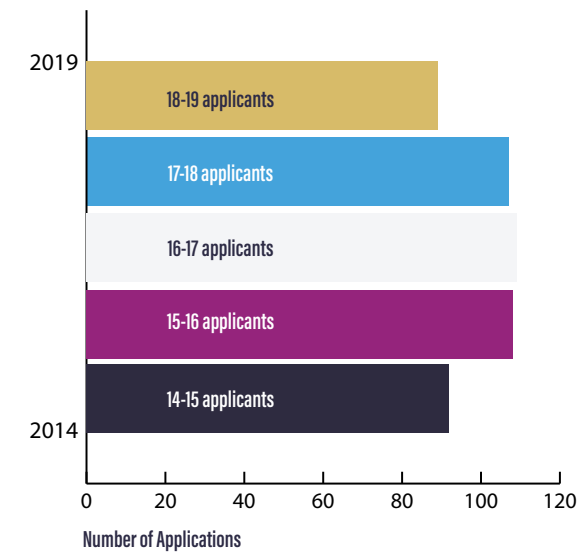
Venture Fellows

These fellows help create an environment for individual and team leadership development on specific Leadership Ventures. Venture Fellows are responsible for assisting with Venture marketing efforts and conducting pre-trip information sessions and activities. Fellows also serve as coaches and facilitators during ventures and collect feedback after the venture to ensure continuous improvement of the program.



William P. Lauder Wharton Leadership Fellows

These fellows act as coaches and mentors for the incoming MBA class. Lauder Leadership Fellows are charged with providing every first-year student the opportunity to enhance their leadership potential through the development of practical tools and concrete strategies applicable to every aspect of life. Fellows mentor, support and facilitate the Learning Team formation process, the MGMT 610 core course, and the 360 evaluation and feedback process.



MBA students gather for their first lecture of the MGMT 610 course.

KEY UG, MBA, EMBA, EE,
Public, Interdisciplinary

executive mba

EMBA**Authors@Wharton Speaker Series**

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UG, MBA, EMBA, EE, Public

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UG, MBA, EMBA, EE

executive mba

[overview]

“My learning team was such a valuable part of my first year growth. Knowing I had an intimate group of people to bounce ideas off of and rely on was very reassuring and our bond continued well after the first year.”

— Anant Shukla, WG'19 Executive Coaching and Feedback Program, Participant, Venture Participants

“Through my work understanding the feedback given in my 360 assessment and my subsequent work with my Executive Coach, I was able to increase my self-awareness and leadership style. I am a better manager as a result because I learned how to manage different types of people rather than applying the same style for everyone.”

— Etori Comi, WG'19 Executive Coaching and Feedback Program Participant

The McNulty Leadership Program creates innovative leadership development opportunities outside of the classroom that are highly customized to the needs of our executive MBAs and working professionals. Students in the MBA for Executives East (WEMBA East) and MBA for Executives West (WEMBA West) classes each gain access to six personalized sessions with a coach as part of the Coaching and Feedback Program.

In the 2018-2019 year, both the WEMBA East and WEMBA West programs had the chance to participate in the Leadership Ventures Rowing Intensive and the Leadership Ventures WEMBA-only Alaska Venture, giving participants additional opportunities to focus on teamwork and challenge in unfamiliar contexts.

The WEMBA Capstone, which is open to all students and held on the last day of classes before graduation, served as a final day of reflection for the Wharton MBA for Executives experience. Members of Class 41 were brought together 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 their time at Wharton. Members of Class 41 came together to share their reflections on what the WEMBA experience meant to them.



Executive MBA students discussing their team projects.



18
opportunities



596
participants

CLASS SIZE FOR 2018-2019 YEAR



PROGRAM	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	SEATS FILLED	OPPORTUNITIES
Capston PHL								■					118	1
Capstone SF								■					107	1
Coaching PHL	■	■	■	■	■	■	■	■	■	■	■	■	61	1
Coaching SF	■	■	■	■	■	■	■	■	■	■	■	■	35	1
Expeditions PHL & SF											■	■	13	2
Intensives PHL & SF													38	5
Workshops PHL	■	■											94	4
Workshops SF	■	■											130	3
TOTALS													596	18



executive education



Executive Education: EE

KEY UG, MBA, EMBA, EE, Public, Interdisciplinary

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 committee plays an integral role in suggesting potential speakers and topics and managing events.

UG, MBA

Executive Coaching and Feedback Program

This program is a unique opportunity for students to get personalized one-on-one executive coaching based on detailed feedback from peers and former co-workers.

MBA, EMBA, EE

Learning Team Experience

During two days in early August, first-year MBA students are introduced to their Learning Teams and begin the process of team formation.

MBA

Leadership Conference

An annual conference featuring distinguished speakers in top leadership roles across industries.

UG, MBA, EMBA, EE, Public

William P. Lauder Leadership Fellows

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

MBA

Leadership in Action on Sirius XM

This is a weekly radio show with a live, call-in format featuring guests from diverse industries.

UG, MBA, EMBA, EE, Public

Lipman Family Prize Fellows

Fellows help plan and execute elements of the Lipman Family Prize award process. Fellows review applications, analyze data, and prepare materials for the Prize Committee.

MBA, Interdisciplinary

Management 610: Foundations of Leadership and Teamwork

The first core course of the MBA curriculum, MGMT610 is an intense immersion experience, including a custom-designed, team-based, and highly interactive simulation.

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

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, MLP supported

P3 Group Facilitators

Seasoned veterans of the program facilitate group conversations over the eight-week curriculum.

MBA

Undergraduate Venture Fellows

Undergraduate students create an environment for individual and team leadership development on a specific Leadership Venture.

UG

Venture Fellows

These are second-year MBA students who create an environment for individual and team leadership development on a specific Leadership Venture.

MBA

Ventures: Expeditions and Intensives

Through Wharton Leadership Ventures, participants are able to step out of their comfort zone, exceed personal limitations, and experience leadership first hand.

Expeditions and Intensives are outdoor, experiential treks that provide genuine environments of uncertainty and change.

UG, MBA, EMBA, EE

Wharton 101: Business and You

This course helps students understand the interrelatedness of business fields and disciplines and acquire a stronger sense of themselves.

UG

Wharton 101 TAs

Upper level students who help deliver the Freshman Gateway Course.

Workshops One to three day programs that focus on various leadership competencies.

UG, MBA, EMBA, EE

executive education

[overview]

“China’s AMP program inspired ideas and offered various practical tools that are especially useful in terms of competitive advantage, leadership, corporate boards, globalization, corporate change, and innovation.”

— China Advanced Management Program Participant

“The interactive teaching experience of the China AMP program was very effective. I not only learned from the professors but also gained a lot of deep insight and experience by exchanging ideas with my classmates.”

— China Advanced Management Program Participant

In partnership with the Aresty Institute for Executive Education, the McNulty Leadership Program ran six leadership courses in the 2018-2019 academic year. These courses provide the unique opportunity to share the wealth of knowledge of our faculty with professionals at various stages of their careers.

Our flagship course, the five-week **Advanced Management Program (AMP)**, offers comprehensive content and an experiential approach that creates an invaluable, reflective pause from the everyday CEO routine. Senior leaders who attend AMP sharpen their critical -thinking skills and hone their leadership capabilities for immediate impact to their businesses upon their return. During the five-week program, coaching is also delivered, both in teams and individually, to accelerate learning and personalized growth. To further reinforce and incorporate the lessons learned during their time with Wharton, coaching sessions continue after the program concludes.

This year marked the pilot of **China AMP program (CHAMP)**, delivered in May in partnership with the McNulty Leadership Program for the benefit of 30 Chinese executives. Professors Mike Useem, Harbir Singh, and Jim Thomson led the pilot. They, along with Todd Henshaw and Anne Greenhalgh, provided a personal and professional defining moment for senior leaders who became better prepared to inspire higher team performance, to formulate corporate visions, and to set new directions for their organizations. The program will continue in Philadelphia in September.

With the **General Management Program (GMP)**, senior executives are given the chance to accelerate their potential by infusing new knowledge and preparing for new challenges ahead. Designed to be completed over two years, GMP consists of six open-enrollment programs. Participants receive six coaching sessions allowing students to tailor their leadership journey to their specific needs. Similarly, the **Advanced Finance Program (AFP)** allows executives to take six open-enrollment finance programs within a two year period. AFP participants expand their knowledge and deepen expertise in the areas of corporate finance, investment strategies, private equity, and venture capital.

The **Executive Development Program (EDP)** prepares fast-track leaders to move from mastery of one focused area to success in a broader role, priming them for greater leadership responsibility in large companies and organizations. In this two week program, participants expand business acumen while benefiting from the expertise of their global classmates from a wide variety of industries and geographical regions.

Other programs delivered in partnership with the McNulty Leadership Program include:

- The two-day **CEO Academy** brings together 38 of the world’s most well-respected current and former chief executives to share what worked while leading their companies through major change. CEOs are able to elevate their thinking about leadership and strategy and to learn from other successful leaders in a collaborative peer environment.
- The five-day **Creating and Leading High-Performing Teams** program is a unique executive leadership development program that combines

the best insights from research and case studies, all tested in the context of hands-on, experiential learning....High Performing Teams provides managers from a wide variety of organizations with the strategic framework and tools to build and lead teams that leverage individual strengths to achieve results.

- The five-day **The Adaptable Leader** program is built on the philosophy that to be an effective leader in today’s volatile business economy participants need to understand who they are as leaders, appreciate their roles on teams, and be able to navigate the environment in which their teams operate.
- The six-day **Becoming a Leader of Leaders** draws on new research and insights as well as on challenging times and pivotal leadership moments in history to provide participants with strategies to strengthen their leadership and build highly effective teams. A Leader of Leaders is run by Wharton Professors Peter Cappelli, Gregory Shea, and Mike Useem.



AMP participants gain a fresh business perspective through their time in the five-week course.



Executive Education participants work on team-building challenges as part of their courses.



PROGRAM NAME	DURATION	DATE	PARTICIPANTS
Advanced Management Program (AMP)	5 weeks	October 2018 May/June 2019	82
CEO Academy	2 days	November 2018	39
Creating and Leading High Performing Teams (HPT)	5 days	October 2018 June 2019	66
General Management Program	2 years	December 2018	Open
The Leadership Edge: Strategies for the New Leader (TLE)	5 days	November 2019 May 2019	49
Becoming a Leader of Leaders: Pathways for Success	5 days	September 2018 April 2019	84
China AMP	5 days	May 2019	38

center for leadership + change management

[overview]

The mission of the Center for Leadership and Change Management 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, beginning with the **Organizational Behavior Conference** in November. The conference featured presenters drawn from top junior faculty working at the cutting-edge of research in the field of organizational behavior. Led by Professor Drew Carton, attendance for the two-day, invite-only conference was kept small to provide an intimate setting that fostered collaboration, close ties, and a supportive atmosphere.

The 23rd annual **Leadership Conference**, entitled *Leading in a Context of Conflict*, was held in June 2019. The diverse lineup of speakers included former Governor of Florida, Jeb Bush; F. William McNabb III, former Chairman and CEO of Vanguard; Mark Turner, Chairman of the WSFS Bank; Judith Rodin, former President of the Rockefeller Foundation and the University of Pennsylvania; and Wharton Management Professor Stephanie Creary. Attendees emerged from the event equipped with the wealth of experience shared by these accomplished speakers and ready to face their own leadership and organizational challenges head-on.

In March of 2019, MLP supported the Identity Research Working Conference. Faculty from Harvard, INSEAD, New York University and the University of Pennsylvania. There were two round robin research presentations: “Not my Job or Is It? The role of flexible identity workspaces in managing jurisdictional

ambiguity in US hospital emergency departments” by Wharton Professor Stephanie Creary; and “Who will you Become? The role of gender and parental role models in committing to professional & family identities” by University of Pennsylvania Professor Rachel Arnett.

Managed by Professor Sigal Barsade with support and administration from the Center for Leadership and Change Management, the **Katz Fund for Research on Leadership and Emotional Intelligence** continues to make The Wharton School preeminent in the study and teaching of emotional intelligence, organizational culture, and leadership development.

The study of emotions includes emotional intelligence (including reading emotions, understanding emotions/empathy, and emotional regulation), discrete emotions, moods, trait affect, implicit affect, and emotional labor. The field of organizational behavior covers the internal running of an organization including leadership, motivation, teamwork, decision-making, innovation, creativity, negotiations, and performance.

The Katz Fund for Research on Leadership and Emotional Intelligence will benefit organizational leaders, scholars, students, and alumni through the creation of new scholarly research, a publicly-available Emotional Intelligence test, and practitioner-oriented workshops and training.



lipman family prize overview

[overview]

The Barry & Marie Lipman Family Prize hosted its 8th annual award ceremony on April 26, 2019. Now in its eighth year, the Lipman Family Prize received applications from over 110 organizations, each dedicated to a range of global causes including economic development, education, environmental sustainability, gender equality, health care, human rights, food security, legal aid, safe water, poverty alleviation, and workers rights.

The 2019 top honoree prize of \$250,000 in unrestricted funds was awarded to **World Bicycle Relief**, a pioneering organization that mobilizes people through “the Power of Bicycles.” They envision a world where distance is no longer a barrier to independence and livelihood. Following the announcement of the award, the ceremony featured an illuminating discussion with World Bicycle Relief that gave all in attendance a better idea of their mission, background, and business approach.

The Lipman Family Prize also honored ACEV and the Global FoodBanking Network each with \$50,000 in unrestricted funds.

ACEV seeks to serve vulnerable young children, their parents, and women. Working across Turkey and internationally, ACEV works with low socioeconomic status groups and refugees.

The Global FoodBanking Network nourishes the world’s hungry through launching & strengthening food banks in more than 30 countries.

In June of 2019, Euria Min became the new Director of the Lipman Family Prize. After conducting a national search that drew close to 100 candidates, Euria was selected for her wide-ranging work experience, passion for civic leadership and demonstrated commitment to excellence. She comes to the role with experience in the for-profit, non-profit and public sectors, including most recently as Director of Operations for the Robert A. Fox Leadership Program in the School of Arts & Sciences at Penn.

Founding Director Umi Howard is still an integral

member of the McNulty Leadership Program. In his new role as Senior Director, Umi is responsible for executing an external strategy for Wharton’s leadership initiatives in partnership with Wharton Executive Education and Wharton External Affairs.

The Beacon Awards

The Beacon Awards will constitute a special awarding in 2020. The hope of this new and unique award structure is to incentivize Lipman Prize honorees to share innovative ideas and connect with others leading cutting-edge change.

While the annual Lipman Family Prize identifies groundbreaking innovations, the new Beacon Awards will focus on the conduit an organization uses to transfer knowledge to others. This special awarding will occur in 2020, at the Global Alumni Forum in San Francisco and will be awarded every five years thereafter. The criteria for choosing winners is designed to value transferability and knowledge sharing as a method of scaling impact; identify leading organizations that are pushing the sector forward; and highlight organizations with continued impact that are poised to expand to another level.

The Beacon Awards are only open to past honorees of the Lipman Family Prize. Two previous honorees will each receive \$250,000 in unrestricted funds. The Beacon Awards reward and support previous Lipman Family Prize honorees who have demonstrated success in scaling up their social impact efforts by collaborating and sharing knowledge across their sector.

In consultation with potential prize recipients and Spring Impact, our partner in social impact scaling models, The Beacon Awards were designed to follow best practices in prize design and award process. Our transparent application process will feature clear decision-making points, ensuring candidates can identify early whether they meet the criteria to progress to future selection rounds. The criteria for choosing winners take into account: value transfer and knowledge sharing as a method of scaling impact; the identification of leaders who are pushing the sector forward; and organizations with continued impact that are poised to expand to another level.



120+
annual applications



140+
countries



6
continents



1.9 MILLION
cash rewards



World Bicycle Relief wins the 2019 Lipman Family Prize



pilots partnerships and collaborations

[overview]

IDEAS Lab

The McNulty Leadership Program supports the work of the IDEAS Lab, which was founded in 2017. IDEAS Lab — which stands for Identity, Diversity, Engagement, Affect, and Social Relationships — supports Wharton Organizational Behavior scholars and friends conducting research in these broad areas. Our monthly meetings serve as an informal platform to share ideas and feedback, and provide intellectual and social support to researchers in these domains.

penn athletics wharton leadership academy

28 coaches and administrators from 14 different teams

This innovative program— a partnership between the athletics department and the Anne and John McNulty Leadership Program at the Wharton School—was conceived by David Pottruck, C'70, WG'72 to foster the leadership abilities of Penn student-athletes. In addition, Kindred Healthcare and CEO Benjamin Breier, a former baseball student-athlete at Penn, made a \$500,000 gift to support the Leadership Academy. Breier has also been a key supporter of the Academy's launch.

Beginning in a pilot phase through 2021, the academy's curriculum includes lectures, workshops, experiential sessions and more generated through the collaboration of the athletics department and Wharton. Running in a pilot phase through 2021, the academy's curriculum includes lectures, workshops, and experiential sessions generated through the collaboration of the athletics department and Wharton.

This fall, 14 teams of freshmen student-athletes will participate in the program. After freshman year, sophomore and junior student-athletes continue in the program based upon their interest and demonstrated leadership potential.

Team captains and coaches participate in leadership development, creating a culture where student-athletes and staff members share a common vocabulary and work together toward a common objective, in competition and beyond. At the end of the four-year 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.

The roll out of the program is as follows:

2017-2018: 7 freshmen teams and their team captains

2018-2019: 7 freshmen teams, their captains, and select sophomores

2019-2020: 14 freshmen teams, their captains, and select sophomores and juniors

2020-2021: All freshman teams, their captains, and select sophomores, juniors, and seniors





14
total teams



162
total students

penn orthopedic program

37 Orthopedic doctors including Orthopedic program directors

Now in its second year, the Penn Orthopedic program brought together 37 orthopedic doctors for a one-day leadership development program facilitated by Senior Fellows Chris Maxwell and Ilene Wasserman. The day was designed to help develop skills for the next generation of Orthopedic Surgeon Leaders and empower them to effect positive change in their field.



penn veterinary partnership

36 participants including international C-suite leaders

Sponsored by the Provost's Office at Penn and Zoetis, the largest animal health company in the world, the collaboration between the Penn Vet School and the McNulty Leadership Program features a yearly four-day professional development program held at the Penn Wharton China Center each May, followed by a five-day field program in the United States or in China. This is an unparalleled opportunity to both schools to impact global food supply as half the pigs in the world are raised and consumed in China.

In October of 2018, Senior Fellow Chris Maxwell accompanied Professor Tom Parsons from the Vet School to Chengdu, China. There, they met a group of 30 executives from many of the largest pork producers in China and led a seminar jointly hosted by the TQLS group and the Tequ Group. Both are Chinese food-and-agriculture conglomerates, the former is leading the sector in the development of

value added brands across several protein sources and the latter is pushing the envelope of novel technology applications in the swine industry. Chris led sessions based on his book, *Lead like a Guide*, and on his background in Positive Psychology. Tom talked about the role of technology in sow health and nutrition and in brand-focused swine production. Pertinent to Tom's sessions in particular was an agreement signed by the Tequ Group, earlier in the year, with Alibaba's Cloud Unit to deploy facial and voice recognition on Tequ's pig farms.

In May of 2019, Marshall Meyer, Tsai Wan-Tsai Professor Emeritus, accompanied Tom Parsons and Anne Greenhalgh to the Penn Wharton China Center where they co-taught a seminar to the same

cohort of the top pork producers in China. Against the backdrop of African Swine Fever decimating Chinese swine herds, Tom covered biosecurity and the control of trans border diseases. Against the backdrop of the trade wars, Marshall spoke with the group about the trajectory of the Chinese economy. And Anne facilitated experiential sessions on communication style and negotiating conflict. Since May, Tom and Anne have been working on plans to return to China in the 2020 academic year.

people lab

The People Lab is a collaborative effort between the McNulty Leadership Program and Wharton People Analytics (WPA). Endowed with a \$2M gift from Rob Katz, People Lab is designed to advance the science and practice of using data-driven assessments and development plans to cultivate personal characteristics vital to long-term success. It is a key pillar of the student personalization strategy of the MBA program. The People Lab evolution got its start in 2013 with the first People Analytics Conference led by Professors Matthew Bidwell, Angela Duckworth, Adam Grant and Cade Massey. In 2016, a cross-functional MBA program office team outlined the personalization initiative and presented the Assessment

Center Concept to the Wharton Dean's office.

In the fall of 2019, first-year MBA students will be given the opportunity to take a range of competencies, including:

- Grit:** The perseverance and passion for long term goals
- Generosity:** The motivation to protect and promote the success and well-being of others

women's leadership initiatives

The McNulty Leadership Program is currently investing in the expansion of the Women's Leadership Initiatives (WLI) focusing on the promotion of gender equity through elevating research, developing programs and connecting networks.

Over the past nine months, we have convened a steering committee of our named donor and industry experts, secured a faculty chair, hired a postdoc to advance research, created a graduate assistantship to support the initiative, and partnered with many university groups to deliver programming for our undergraduates, MBAs, executives, and alumni.

Some sample events of the past year include: an MBA women's workshop on building your leadership brand; an all women Executive Education alumni networking panel; fireside chats with Elizabeth Vale and Carla Harris; a power couple panel featuring Leadership Advisory Board member Randi Brosterman Hutchens and her husband Bob Hutchens; a lunch and learn addressing the necessity of work/life balance; and talks with female leaders such as Amity Milhiser of PwC, Valerie Jarrett and Melinda Gates.

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. 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.



Jonathan I. Berger, W'91
Co-founder, Chief Executive and Chief Investment Officer, Birch Grove Capital

Mr. Berger is the co-founder, Chief Executive and Chief Investment Officer of Birch Grove Capital. Mr. Berger is Chairman of the firm's Investment Committee and a member of the Risk

Committee. Prior to founding Birch Grove, he was the President and CIO of Stone Tower Capital LLC, a \$17 billion alternative credit asset management firm, where he was directly responsible for overseeing all investment activities including \$2 billion in credit hedge funds and chaired the firm's investment committees. At Stone Tower, he managed 73 employees internationally, including an experienced team of 24 investment professionals. Prior to that, Mr. Berger was a co-founder and partner of Pegasus Capital Advisors L.P., a special situations private-equity fund managing over \$1.1 billion. He was responsible for developing and managing Pegasus' investments in the public security markets and highly structured security investments. Prior to that, he was a vice president in the High-Yield and Distressed Securities Group at UBS Securities LLC, a principal at Rosecliff, Inc., a middle-market private equity fund, and an associate in the Leveraged Finance Group at Salomon Brothers Inc. Mr. Berger holds a B.S. in Economics with a concentration in Finance from the Wharton School of the University of Pennsylvania.



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).



David Hess, W'97
Partner, Centerview Partners

David Hess (W'97) is a partner at Centerview Partners, one of the largest independent advisory firms. David is a member of the technology investment banking team, where he advises large corporate clients on mergers, acquisitions

and other strategic activity. Recent transaction activity includes the merger of Sprint and T-Mobile, the merger of Vantiv and Worldpay and the separation of Xerox into separate public companies. Prior to joining Centerview in 2011, David spent 12 years as an investment banker at Goldman Sachs, ultimately running the firm's software and IT services practice. David joined Schroder & Co. as an investment banking analyst in 1997 after his graduation from Penn.

In addition to his role as a member of the Leadership Advisory Board, David is President of the Board of Trustees of the Abraham Joshua Heschel School, one of the largest Jewish Day Schools in New York, and is a Board member of the Local Initiatives Support Corporation. David lives in Manhattan with his wife, Diane (C'97).



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 two children who are currently in college.



Brig. Gen. Peter M. Dawkins, USA (Ret.)
Former Vice Chairman, Citigroup Private Bank

A 1959 graduate of West Point, Pete served for 24 years in the U.S. Army. During his military career, he commanded a company in the 82nd Airborne Division, led a battalion in Korea, taught at West Point, was a

White House Fellow, and served as Military Assistant to the Deputy Secretary of Defense. After serving in Korea, he commanded the 3rd Brigade of the 101st Airborne Division, and was promoted to Brigadier General in 1981.

Pete holds numerous military awards and decorations, including the Distinguished Service Medal, the Legion of Merit with Oak Leaf Cluster, the Bronze Star for Valor with Oak Leaf Cluster, and three Vietnamese Gallantry Crosses. At West Point, Pete was First Captain of the Corps of Cadets, President of the Class of 1959, Captain of Army's undefeated football team and an All-American halfback. He won the Heisman Trophy as the nation's outstanding college football player. Selected as a Rhodes Scholar, Pete studied at Oxford University, and later received a Masters degree and a Ph.D. from the Woodrow Wilson School at Princeton University.

In 1983, following his career in the Army, Pete entered the world of business. He joined Lehman Brothers as head of the firm's Public Finance banking business, where he led a three-year initiative focused on providing creative financing to meet the need to overhaul a significant portion of the physical infrastructure throughout the country.

After running in 1988 as the Republican candidate for the U.S.

Senate in New Jersey, Pete moved to Bain and Company – a Boston-based strategy consulting firm – where he became head of the U.S. consulting business. In 1991, he was recruited to become Chairman and CEO of Primerica Financial Services, where Pete assumed the high-profile role of the recently departed founder, and led the company for the next five years.

Following that, Pete held a series of executive positions in what became Citigroup. He served as Vice Chairman and EVP of Travelers Insurance, then Vice Chairman of the Citigroup Private Bank and, finally, Vice Chairman of Citigroup Global Wealth Management.

Pete remains active in a variety of national, community and philanthropic roles. His listing of Board service includes Iridium Satellite, LLC; Olatec Industries, LLC; the Wharton School's Center for Leadership and Change Management; the Intrepid Museum; the Secretary of Defense Policy Board; the Boards of Trustees of the United States Military Academy, Hampton-Sydney College, Emory University Business School, and the Johns Hopkins School of Public Health.

Time magazine identified Pete as one of the "Top 50 Leaders in the U.S." Among his many awards for public service is the National Institute of Social Sciences Gold Medal Award for Distinguished Service to Humanity, the BENS Eisenhower Award for Distinguished National Service, and The National Football Foundation and Hall of Fame Gold Medal Award. He was inducted into the College Football Hall of Fame in 1975 and West Point's Army Sports Hall of fame in 2005. Pete was selected in the inaugural class as a Distinguished Graduate of the United States Military Academy and, in 2006, was recognized by the Horatio Alger Association by receiving its Distinguished American award.

Pete and his wife Judi have been married for 48 years. They have two grown children, three grandsons, and three granddaughters.



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, WG'69
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, HOM'90
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 eleventh 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, W'88
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.



Shervin Korangy, W'96
President and Chief Executive Officer,
BVI Medical

Shervin Korangy brings to BVI over 20 years of general management, operational, financial, and investment experience across a diverse array of industries including healthcare, consumer products, telecom, manufacturing and financial services. His

experiences also span across numerous geographies including the US, Switzerland, France, Ireland and the UK. Prior to BVI, Shervin was a senior executive with Novartis Group AG, one of the largest global diversified healthcare companies, holding roles to include Global Head of Corporate Finance, Managing Director and Country Head Alcon UK & Ireland, and Country Head of France.

Before Novartis, Shervin spent 15 years with The Blackstone Group, one of the world's leading alternative investment firms, most recently as a Managing Director with experience in both the Restructuring and Private Equity businesses. He currently serves on the Board of Directors of Hain Celestial (Nasdaq: HAIN) and Motus GI (Nasdaq: MOTS). Shervin is a graduate of the Wharton School of the University of Pennsylvania.



Peggy Koenig, WG'86
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, WG'88
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 Estee 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, W'96
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 of the Board, 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 and his B.A. in Economics from Davidson College.



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, the 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 *Forbes'* inspirational series on Leading a Positive Life.

Ginny holds a BA from the University of Washington and lived in London for 5 years 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 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.



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 Saudi 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.

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.



Kelly Busch
Events Manager

Kelly is the Events Manager for the McNulty Leadership Program and is responsible for the planning and management of the Authors@Wharton speaker series. She also provides oversight for all conferences and other high-profile events sponsored by the Program, Prize, and Center.

Prior to joining MLP, Kelly worked for Wharton Operations as the Special Events Manager responsible for scheduling all Special Events that occurred in the five buildings that comprise the Wharton Complex. Kelly has over ten years of experience working in the hospitality industry. Her experience has included work at Mid-Atlantic Events Magazine, Normandy Farm Hotel and Conference Center, The Kimpton Hotel Group, and Peachtree and Ward Catering.

Kelly has a BA in Communication Studies with an emphasis in Public Relations from Clemson University. During her undergraduate studies, Kelly also participated in a Semester at Sea, where she was immersed in the culture of twelve different countries. She is currently a candidate for the Master of Organizational Dynamics at the University of Pennsylvania.



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.



Christine Fisher
Program Manager, Ventures

Christine serves as Program Manager for the Ventures team, responsible for the core operations and many details that go into all of our intensives and expeditions. Prior to joining the McNulty Leadership Program, she managed the On-Campus Recruiting Suite on behalf of MBA Career

Management. She comes to Wharton following several years of experience as an account manager and event planner in both the non-profit and craft beer industries.

A proud Philadelphia native and Penn alumna, Christine currently lives in the Squirrel Hill neighborhood with her husband Pete, dogs Penny & Hawkeye, and Zappa the cat. She frequently travels to New Orleans, loves to read non-fiction, and is training for her first half-marathon.



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 an MA in Geography and Urban Studies from Temple University. She is an amateur gardener, chef, and cyclist.



Umi Howard
Senior Director
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.



Clair Johnson
Associate Director, Data Collection & Analysis

Clair is the Associate Director responsible for MLP's data collection and analysis. She is a research and program evaluation professional, with experience working in higher education

and for non-profit organizations. Most recently, she worked

in institutional research at San Diego City College, where she designed, managed, and presented research studies to a variety of campus stakeholders. She has training and practical experience conducting mixed methods research and program evaluations for the purposes of improvement and ongoing reporting. Clair is most excited about the application stage of research, helping others understand and apply the results. She holds a PhD from Boston College in Educational Research, Measurement, and Evaluation.

Clair lives with her husband, Joe, and her cat, Maus. She is a voracious reader and enjoys crocheting, cooking, and unfortunately, reality television. Relocating from San Diego to be closer to family, Clair has settled in the Haddonfield area of New Jersey.



Lynn Krage
Senior 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.



Euria Min
Director, Lipman Family Prize

Euria is the Director of the Barry and Marie Lipman Family Prize. She has previously served as Director of Operations for the Robert A. Fox Leadership Program in the School of Arts & Sciences at Penn, helping students identify, develop and apply their

unique skills and passion through developmental research or public service fellowship opportunities, both domestically and internationally. She also served as the Director of Operations for the Fels Institute of Government, Penn's Master of Public Administration program.

She graduated summa cum laude from UCLA with a B.A. in Communication Studies and minor in Global Studies, and received her master's in Public Administration from Cal State Long Beach. Euria grew up in Chicago and Los Angeles, and now calls Philadelphia home. She is an active volunteer in the Philadelphia community, serving as judge of elections for her neighborhood polling place, an associate board member for Covenant House PA, and previously working with the district attorney's office juvenile justice diversion program and the American Red Cross disaster action response team. She currently lives in the Old City area with her husband.



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.



Monica Peters
Program Manager, William P. Lauder
Leadership Fellows

Monica Peters is Program Manager for the William P. Lauder Leadership Fellows and will take the lead on P3 for spring 2019 going forward. Monica comes to the McNulty Leadership Program with five years' experience in product development and production in the fashion industry.

She worked at companies such as L Brands and Tory Burch, supporting the product lifecycle from concept to store by managing samples, product cost, and production calendars. Monica also served as a liaison between international factories and internal teams to execute desired product runs with limited time and budget.

Monica earned her Bachelor's Degree in Fashion Merchandising from Marist College. She previously lived in New York and Columbus, Ohio. She recently moved to Philadelphia and is especially enjoying the city's great museums and volunteering at MANNA.



Michael Pratt
Administrative Coordinator, Leadership
Development Workshop Series

Michael Pratt supports MBA, MBA for Executive, and Executive Education programming as an Administrative Coordinator. He is responsible for implementing the Leadership Development Workshop Series, and

he assists the daily operation of the Executive Coaching and Feedback Program.

Prior to joining Wharton in 2019, Michael interned with curatorial departments at the Philadelphia Museum of Art, the Clark Art Institute, and the Museum of Fine Arts - Boston. He has a B.A. from the University of Massachusetts - Amherst and an M.A. from Williams College, each in Art History. Michael lives in Chinatown with his partner and his sourdough starter.



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 programming 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.

upcoming events

aug

MLP Learning Team Experience
August 12 - August 14, 2019

MGMT 610: Foundations of Teamwork and Leadership
August 16 - August 22, 2019

sep

Executive Development Program
September 15 - 27, 2019

Advanced Management Program
September 29 - November 1, 2019

Authors@Wharton presents Malcolm Gladwell
September 25, 2019

Advanced Management Program
September 29 - November 1, 2019

oct

Women's Executive Leadership Program:
October 21 - 25, 2019

Authors@Wharton presents Disney CEO Bob Iger
October 15, 2019

nov

Executive Development Program
November 10 - 22, 2019

Leadership Lecture with Hedge Fund CEO Bill Ackman
November 20, 2019

feb

February Leadership Advisory Board Meeting
February 25-26, 2020

mar

Wharton Global Forum in Singapore
March 12 - 14, 2020

Executive Development Program
March 15 - 27, 2020

Business Strategies for Success
March 30 - April 3, 2020

apr

9th Annual Lipman Family Prize Award Ceremony
End April, 2020

may

MBA Reunion Weekend
May 15-16, 2020

Wharton Graduation
May 17, 2020

University Commencement
May 18, 2020



annual stewardship report

leadership.wharton.upenn.edu

