



McNULTY  
LEADERSHIP PROGRAM

# ANNUAL LEADERSHIP REPORT

2019-2020





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# LETTER FROM THE LEADERSHIP TEAM

Board Members, Partners, and Friends,

We are pleased to share with you our annual stewardship report for the 2019-2020 academic year. It goes without saying that 2020 has been a challenging year for our students, our staff and faculty, city, and country. Many of us left Jon M Huntsman Hall for spring break not fully understanding the impact of the COVID-19 pandemic. In short order, our students had to adapt to the new, and seemingly more intense, world of virtual instruction and then mourn the loss of in-person graduations and good-byes. However changed the world is at the moment, we are still able to celebrate our many accomplishments:

- In early February, People Lab launched to MBA students.
- We virtually celebrated our 9th year of Lipman Family Prize Honorees and introduced the Beacon Award to previous Lipman honorees.
- We increased training for undergraduate student athletes participating in our Penn Athletics Wharton Leadership Academy (PAWLA).
- We increased programming for women at Wharton under the umbrella of the Women's Leadership Initiatives.
- We entered into new partnerships, most notably with the Wharton People Analytics Department.
- We transitioned our 2020 Leadership Conference onto a virtual platform and, in June, supported a PAWLA online speaker series.
- McNulty Leadership Program welcomed two new staff members and had two internal staff promotions.
- We said goodbye to our long-standing Advisory Board Chair Todd Thomson and welcomed our new Board Chair, F. William McNabb III.
- And at the time you are reading this report, we will have said goodbye to our Dean for the past six years, Geoffrey Garrett, and welcomed Dr. Erika James as Wharton's new Dean.

As always, we invite you to read the following report with care. We depend on your expert and thoughtful advice as we continue to design and deliver top-tier programming in keeping with the values of the McNulty Leadership Program (MLP)—learning, excellence, and compassion.

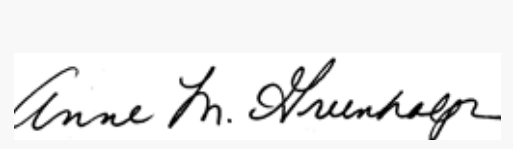
Thank you for your continued engagement and support. We look forward to seeing you all when we are able to convene as a group, and we hope for your continued well-being and success.



Center for Leadership Director



Executive Director



Executive Deputy Director





# CONFERENCES AND SPEAKERS

## Authors@Wharton Speaker Series

The Authors@Wharton Speaker Series seeks to enrich intellectual engagement and encourage dialogue between students, faculty, staff, and alumni outside of the classroom. Launched in 2012 by Professor Adam Grant, our events are open to all members of the Penn community at no cost.

Our world-renowned speakers have written on a variety of topics and published books ranging from more traditional business and management best-sellers to novels, memoirs, and current affairs. Events are typically held on Mondays or Wednesdays in the evening throughout the Fall and Spring semesters, and a limited number of each speaker's books are distributed on a first-come basis.

### Malcolm Gladwell

*Talking to Strangers: What We Should Know about the People We Don't Know*

### Robert Iger

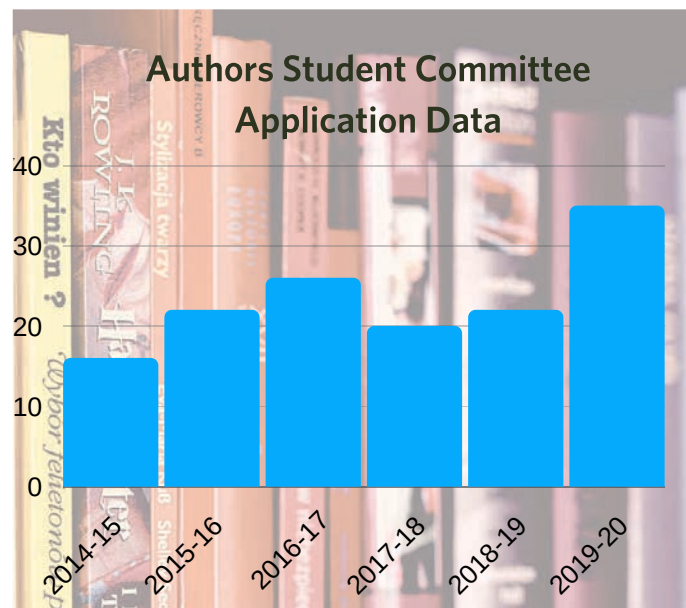
*The Ride of a Lifetime: Lessons Learned from 15 Years as CEO of the Walt Disney Company*

### Carly Zakin and Danielle Weisberg

*How to Skimm Your Life*

### David Kwong

*Spellbound: Seven Principles of Illusion to Captivate Audiences and Unlock the Secrets of Success*



Over the past six years, applications to the Authors@Wharton Speaker Series Student Committee have increased. The committee, comprised of both undergraduate and MBA students, assists with the support and the delivery of the series. The students are involved in author selection, marketing and promotion of the series, and event design and delivery.







## Organizational Behavior Conference

Founded in 1994, the Wharton OB Conference is intended as a forum for junior faculty in organizational behavior to present new work. Conference presenters are individuals who are on the cutting edge of research in our field and whose work represents creative and high-quality scholarship. Traditionally called the Wharton OB “mini-conference,” the conference numbers are kept small to provide an intimate setting to foster collaborative ties and a supportive atmosphere. The Wharton OB conference is sponsored by the Management Department.

## Wharton Leadership Conference

We postponed the all-day, in-person Wharton Leadership conference to June 2021 and transitioned to a new virtual event series titled “Leadership in the Wake of COVID-19: What Enterprise Leaders Will Need to Survive and Prosper in the Years Ahead.” Wharton Management professors Peter Cappelli and Michael Useem led this virtual series of six speakers with the help of Knowledge@Wharton News Director Steven Gugliemi. The virtual series is available on the Knowledge@Wharton website and YouTube channel.

### **Lord Greg Barker**

*Executive Chairman of En+ Group & former member of UK Parliament*

### **Milind Pant**

*Chief Executive Officer, Amway*

### **Sydney Finkelstein**

*Steven Roth Professor of Management, Tufts School of Business, Dartmouth College*

### **Sherry Bahrambeygui**

*Chief Executive Officer, PriceSmart*

### **Lori Ryerkerk**

*Chief Executive Officer, Celanese Corporation*

### **Dr. Stephen C. Rush**

*Radiation Oncologist, NYU Langone Medical Center; Lt. Col. Flight Surgeon, Air Force Special Warfare; Commander, 106 RQW Medical Group*

# MCNULTY LEADERSHIP PROGRAM

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

We ask the participants in our programs to be students of leadership in and outside the classroom, to engage in stretch experiences that test knowledge and skills, and to cultivate supportive relationships that foster growth and development. Whether through required coursework, community-wide offerings such as the Executive Coaching and Feedback Program, or open enrollment programs including Wharton Leadership Ventures, we 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 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 into deliberate practice, our students can build skills, especially the abilities to:

- Think creatively and critically
- Use emotional intelligence
- Communicate well with others
- Give and receive feedback
- Exercise influence
- Motivate oneself and others
- Work well in a team
- Contribute to synergistic group decision-making
- Cultivate organizational awareness, especially in an understanding of organizational culture





MLP administers its end-of-year survey at the end of each academic year. The survey collects information about participants' experiences across all MLP programming to inform future planning and enable program monitoring. A total of 1,697 participants received an invitation to complete the 2019-2020 survey. Participants included anyone who participated in MLP programming at which attendance was tracked. Participants who dropped out of programming still received an invitation to complete the survey.

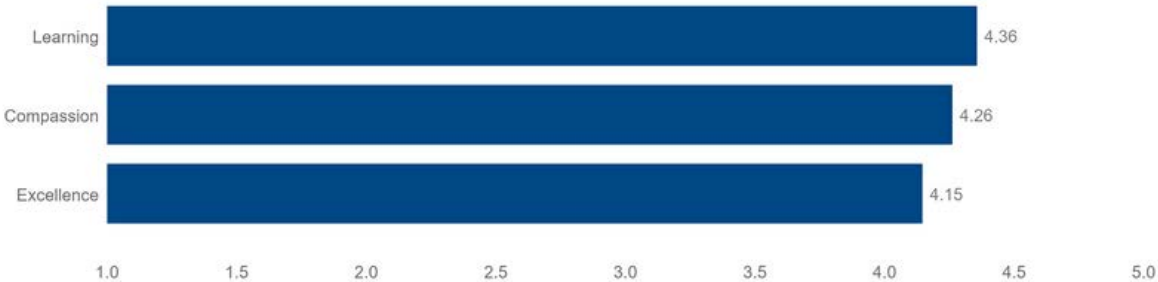
A total of 251 respondents provided usable responses, resulting in a final participation rate of 15%.

Items reported below on a scale from 1 to 5 reflect the following scoring categories: 1 = Strongly disagree; 2 = Disagree; 3 = Neither agree nor disagree; 4 = Agree; 5 = Strongly agree.

As a result of my participation in McNulty Leadership programming...



The facilitator(s) of McNulty Leadership programming demonstrated a commitment to the value of...





# Our programs

## Advanced Management Program (AMP)

AMP is an immersive five-week program in which senior leaders hone their leadership capabilities.

*EE*

## Authors@Wharton Speaker Series

World-renowned authors come to campus and share their ideas on topics from management and leadership to the social sciences to gender in the workplace.

*UG, MBA, EMBA, EE, public*

## Authors@Wharton Student Committee

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

*UG, MBA*

## Executive Coaching and Feedback Program (ECFP)

ECFP provides 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*

## Leadership Conference

The annual conference features distinguished speakers in top leadership roles across industries.

*UG, MBA, EMBA, EE, public*

## Leadership in Action on Sirius XM

Co-hosted by Mike Useem, Jeff Klein, and Anne Greenhalgh, this weekly radio show features guests from diverse industries.

*UG, MBA, EMBA, EE, public*

## Learning Team Experience

During two days in early August, MBA students meet their Learning Teams and begin the process of team formation.

*MBA*

## Leadership Development Workshops

Shorter in duration than intensives and expeditions, workshops give students the chance to focus on particular leadership competencies.

*UG, MBA, EMBA, EE*

## Lipman Family Prize Fellows

Fellows help plan and execute the Lipman Family Prize award process. They review applications, analyze data, prepare persuasive cases for the prize selection committee, and attend the awards ceremony announcing the winners.

*MBA, interdisciplinary*

## Management 610: Foundations of Teamwork and Leadership

The first core course of the MBA curriculum, MGMT 610 is an intense immersion experience that showcases a custom-designed, team-based, and highly interactive simulation.

*MBA*

## Nonprofit Board Fellows (NBFs)

Fellows serve local Philadelphia nonprofit organizations with the goal of supporting the mission of partner organizations while providing valuable board experience for our students.

*MBA, interdisciplinary*

## P3: Purpose, Passion, Principles (P3)

P3 brings together students through a structured six-week curriculum that enables them to gain a deeper understanding of their own definitions of success and happiness and to consider how their understanding relates 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 (VFs)

Fellows foster the leadership development of participants on expeditions.

*UG*

## Venture Fellows (VFs)

Second-year MBA fellows create an environment for individual and team leadership development on specific Leadership Ventures.

*MBA*

## Ventures — Expeditions, Intensives

These are outdoor, experiential-based treks that provide genuine environments of uncertainty and change. They give students the chance to step out of their comfort zones, exceed personal limitations, and experience leadership first hand.

*UG, MBA, EMBA, EE*

## Leadership Development Workshops

Shorter in duration than intensives and expeditions, workshops give students the chance to focus on particular leadership competencies.

*UG, MBA, EMBA, EE*

## Wharton 101: Business and You (WH101)

*Exploring Business Pathways and Developing Your Potential*

WH101 gives freshmen and newly admitted transfer and dual degree students the opportunity to reflect on their own leadership capabilities while exploring possible fields of study and careers in business.

*UG*

## Wharton 101 TAs

Wharton teaching assistants help support the delivery of the freshman gateway course, Wharton 101. Students serve as peer mentors for the incoming students.

*UG*

## William P. Lauder Leadership Fellows (LFs)

Fellows mentor first-year students so that they can develop their personal leadership skills and optimize their Wharton MBA experience.

*MBA*

## Women's Leadership Initiatives

MLP is investing in the expansion of the Women's Leadership Initiatives by focusing on the promotion of gender equity through research and co-curricular offerings.

*UG, MBA, EMBA, EE*

# SNAPSHOT OF 2019-2020

63

LEADERSHIP  
DEVELOPMENT  
OPPORTUNITIES

*"This program taught me to have the courage to change and adapt to feedback."*

-VENTURE FELLOW

8

FELLOWSHIPS AND  
STUDENT GROUPS

468

FELLOWSHIP AND  
STUDENT GROUP  
APPLICATIONS RECEIVED

*"Wharton 101 TA program has offered me training and experiences that have helped me learn and grow as a person."*

-WHARTON 101 TA

*"Applying the principles learned during my coaching sessions to real-time work activities was extremely beneficial."*

-WEMBA Participant

70+

COMMUNITY-WIDE  
SPEAKER EVENTS

# UNDERGRADUATE PROGRAM OVERVIEW

Wharton undergraduates embark on their new academic requirement — the Leadership Journey — by way of a curriculum that spans all four years.

The first-year gateway course focuses on self-reflection and exploration of the Wharton curriculum. Subsequent courses focus on written and oral communications, teamwork, and interpersonal skills. Integrative group projects for seniors build on knowledge gained from the previous three years. Co-curricular programming — such as Wharton Leadership Ventures (WLV) and Leadership Workshops — complements and supplements classroom learning.

During the course of their four-year journey, students come to appreciate that leadership is an act best developed through study, feedback from trusted colleagues and peers, and stretch experiences that stimulate your growth and development. They will also begin to hone four skills essential to the pursuit of personal, academic, and professional goals: the ability to think creatively, to analyze and solve problems, to apply what is learned, and to reflect on learnings.

## A Leadership Journey Integrated Over Four Years



### FRESHMEN

Wharton 101: Discover curricular opportunities (business pathways), understand your own strengths and leadership potential, and prepare for the Wharton Experience.

### SOPHOMORES

Wharton 201: Develop your writing and presentation skills for business.

### JUNIORS

Wharton 301: Build your teamwork and interpersonal skills.

### SENIORS

Participate in integrative/capstone projects or courses that tackle applied problems.





## Undergraduate Ventures — Expeditions and Intensives

This year, the Undergraduate Ventures program ran two Expeditions and three Intensives 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.

There were two Expeditions offered this year: Antarctica and Patagonia both over the winter break. Students also had a choice of three Intensives\*: Team Sailing in Annapolis, Rock Climbing in Maryland, and the High Ropes Challenge Course in Philadelphia.

*\*Wharton Leadership Ventures were unable to run Spring Expeditions and Intensives because of the pandemic.*

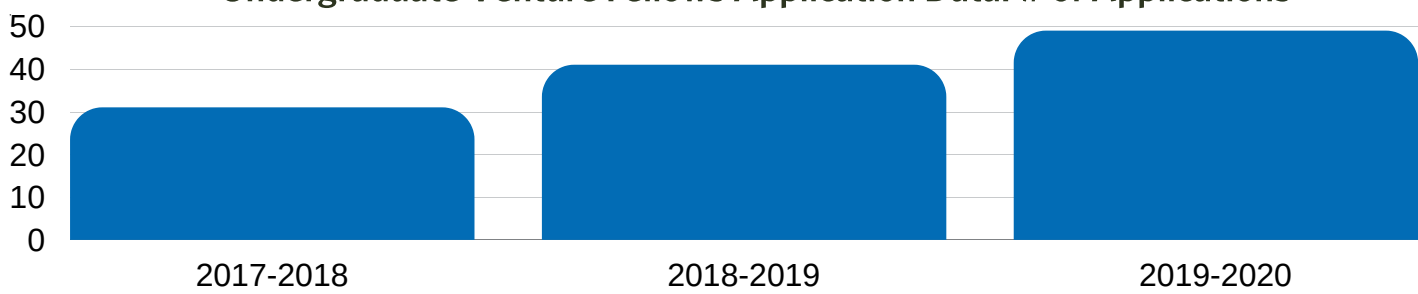
## Undergraduate Ventures Fellows

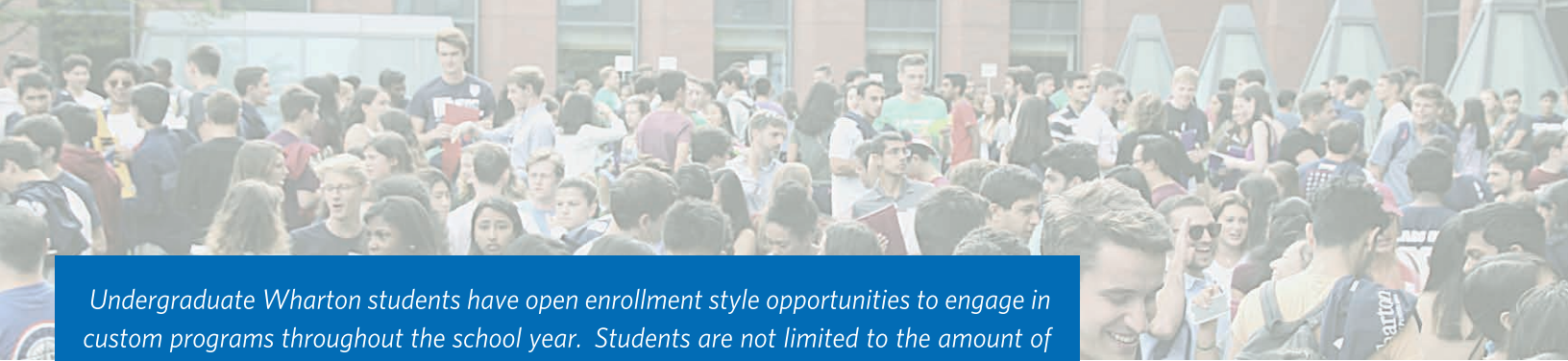
Venture Fellows (VFs) recruited eight new members this spring. The community consists of 26 VFs ranging from sophomores to seniors. VFs participated in two annual trainings in 2019-2020. Each training focused on the core skills and leadership competencies required of a VF:

- Conducted this year in Michaux State Forest, PA, the expedition training over fall break included five days of in-field training that gave VFs both the back country and facilitation skills needed to support the Ventures. Eight world-class guide-educators staffed the training alongside WLV staff members.
- In the spring, a new venture simulation in the Wissahickon in Philadelphia's Fairmount Park, PA, provided VFs with opportunities to think on their feet and make group decisions. Afterwards, they honed facilitation skills and debriefing techniques that will help them support reflection and learning on Ventures.

In addition to trainings, two VFs were selected to attend the United States Naval Academy conference on behalf of WLV in the fall of 2019. The VFs learned valuable leadership lessons that they then brought back to their VF and student communities.

**Undergraduate Venture Fellows Application Data: # of Applications**





*Undergraduate Wharton students have open enrollment style opportunities to engage in custom programs throughout the school year. Students are not limited to the amount of learning opportunities provided by MLP. Student Leadership opportunities provide students with a deeper level of stewardship, development, and training.*

## Undergraduate Workshops

Undergraduate Leadership Workshops are half-day sessions targeted towards specific leadership development competencies. MLP works with experts in the field to host these learning opportunities. This year we introduced two new workshops. Energy Leadership focused on managing your own stress. Better Communication Through Improvisation focused on how students learn to think under pressure.

### DEVELOPMENT OPPORTUNITIES

#### Better Communication through Improvisation

Develop communication and decision-making skills through the practice of improvisation. Participants go through activities on active listening and thinking on their feet.

#### Difficult Conversations

The answer to every intractable argument is the answer to one of these questions: What do they think is true? What do they think is right? What do they think they want? And, oh yes, how strongly do they feel about it?

#### Energy Leadership

The true leverage in long-term and sustainable success is the ability to manage one's own mind and the energy we project as we work with others and ourselves.

#### Equine Team Building

Horses are large, expressive, and sensitive creatures that offer unique opportunities for experiential learning. Students will understand the feedback they receive from their horses and learn to translate their awareness into action.

#### Leadership Presence

This workshop gives a window into ensemble play-making with an eye toward leadership principles in a fun, original, high-energy, and accessible manner.

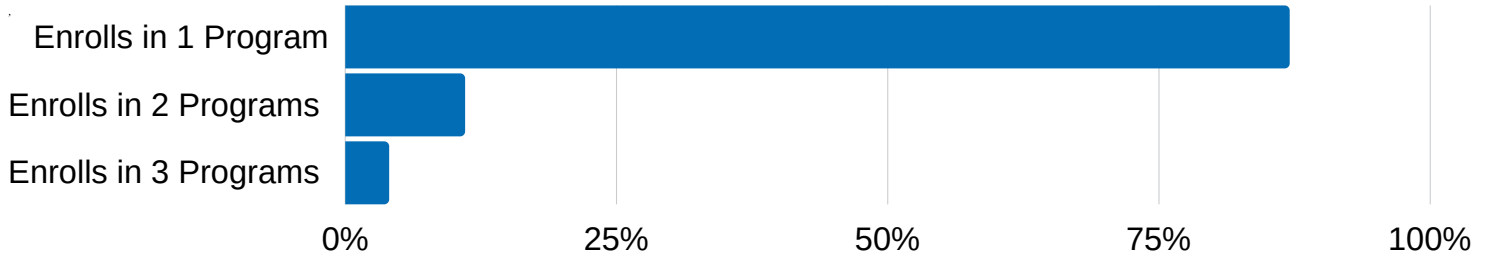






## Undergraduate Data

Unique Undergraduate Student Participants: 189



Opportunities/Class Size	2017-2018	2018-2019	2019-2020
Leadership Ventures	15	9	6
Fellowships and Student Groups	4	3	3
Class size 2020	546	738	693
Class size 2021		662	693
Class size 2022		609	635
Class size 2023			525
Wharton 101 Seats Filled	684	646	652
Wharton 101 Opportunities	4	1	1
WLV Expeditions Seats Filled	34	36	29
WLV Expeditions Opportunities	4	4	2
WLV Intensives Seats Filled	76	74	60
WLV Intensives Opportunities	5	4	4
UG Workshops Seats Filled		37	69
UG Workshops Opportunities		3	4
Wharton 101 TAs Seats Filled	36	40	36
Wharton 101 TAs Opportunities	1	1	1
Venture Fellows Seats Filled	17	26	26
Venture Fellows Opportunities	1	1	1
A@W Committee UG Seats Filled	6	4	6
A@W Committee Opportunities	1	1	1
<b>Total Seats Filled</b>		863	878
<b>Total Opportunities</b>		15	14



# STUDENT VOICES

“MLP has been the highlight of my time at Penn and Wharton, both serving as a Wharton 101 TA for 3 years and participating in the Antarctica Expedition. It has changed my life for the better in so many ways...please continue this for future students!”

“Through my job as a Wharton 101 TA, I've grown as a leader and facilitator. The most significant change is the greater perspective I've gained by talking to students from all backgrounds.”

“The most significant change I experienced from the Energy workshop was learning to be more aware of how other people are feeling and how I can adapt to make people/teammates feel comfortable and respected.”

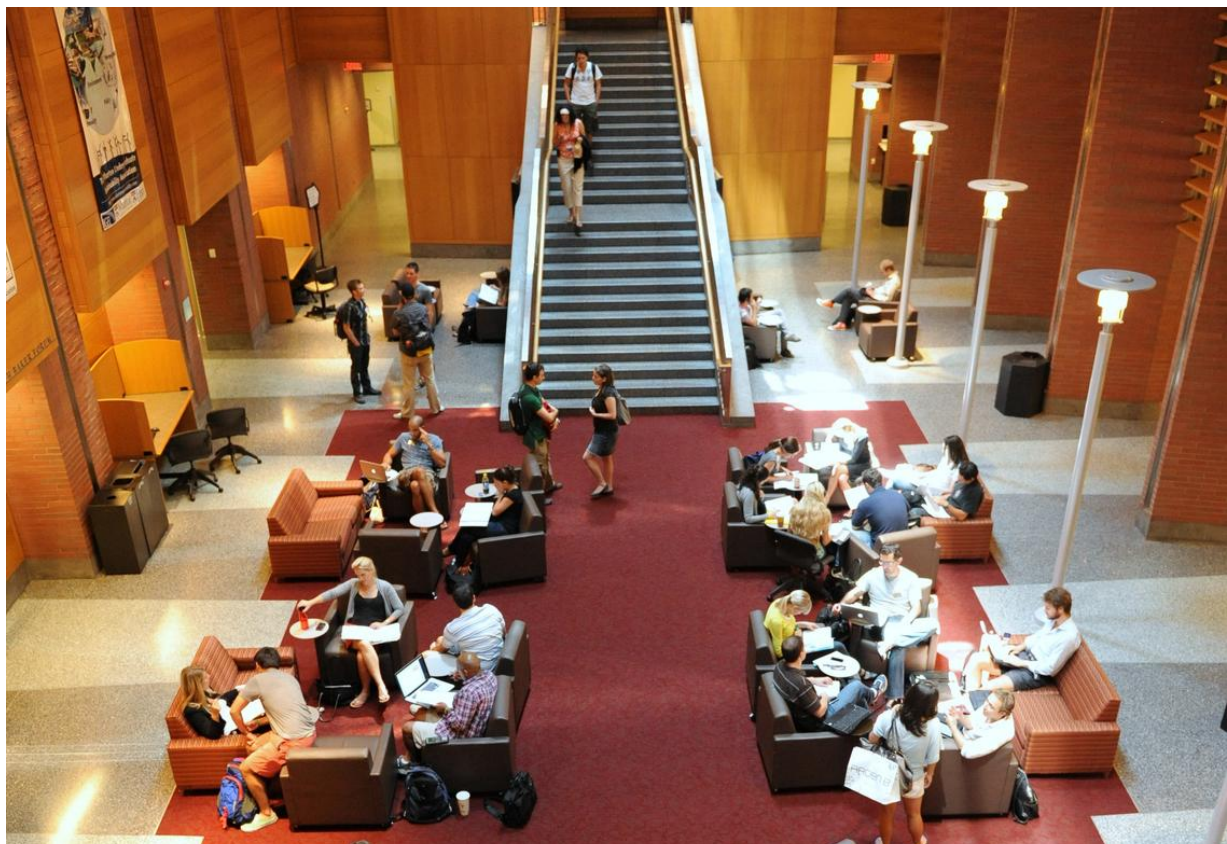
“I think I am now more aware of my specific leadership style as a result of my participation in MLP. I am able to adapt my leadership style to meet the needs of my classmates or teammates. I know how to use my leadership skills, but I also understand how to use skills outside of my style of leadership.”

# MBA PROGRAM OVERVIEW

MBA students are first introduced to MLP during pre-term of their first year, and 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 MGMT 610 course ends, students move into their first semester.

In total, MBA students are able to choose from 30 unique leadership development opportunities with MLP — ranging from fellowships to coaching to ventures to the Authors@Wharton Speaker Series. Nearly 1,000 students in the MBA program participate in co-curricular programming, an estimated half of each class.

The total class size for  
the 2019-2020 year was:  
Class of 2020: 857 students  
Class of 2021: 873 students

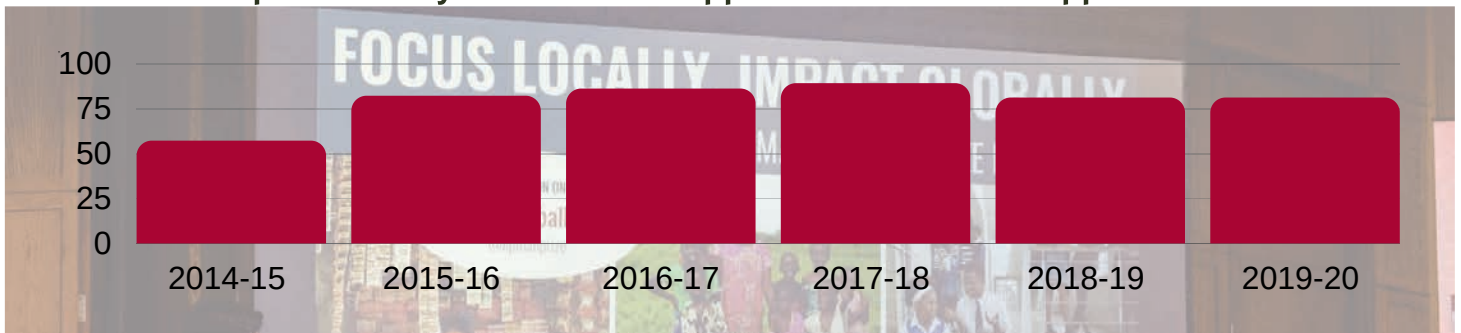


# MBA FELLOWSHIPS

## Lipman Family Prize Fellows

These fellows help with analysis and review of global social impact organizations for the Lipman Prize. Fellows are recruited from across all 12 of Penn's schools and review applications, analyze data, prepare reports, and present materials for the Prize Selection Committee. Typically, Lipman Fellows also help with the award ceremony where the winner is announced, but were unable to do so this year as the ceremony was cancelled because of the pandemic and honorees were not able to come to campus as in the past. When the fellowship became virtual after Spring Break, the fellows continued to gather as a community to hear from guest speakers, meet the winner of the Lipman Family Prize, and reflect on their learnings and celebrate their accomplishments from the past year.

**Lipman Family Prize Fellows Application Data: # of Applications**

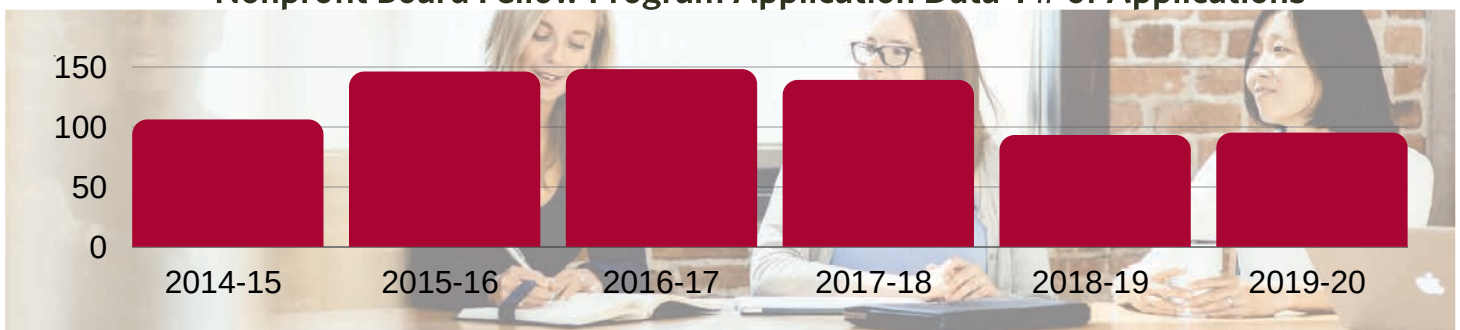


## Nonprofit Board Fellow (NBFs)

These fellows, a mix of Wharton MBA and Penn Law students, serve as visiting board members in Philadelphia nonprofits and complete projects in service to their boards. Fellows begin their service by researching the city's nonprofit sector. They also participate in professional development and training sessions that cover such topics as nonprofit governance, social identity, influence, and story crafting. Fellows reflect on their progress during monthly small group meetings and regular check-ins with program staff.

\*During the last two years of the NBF program, the fellow application season went from once per year to twice per year to allow for more access to Philadelphia partners and to provide the best individual training to Nonprofit Board Fellows.

**Nonprofit Board Fellow Program Application Data\*: # of Applications**







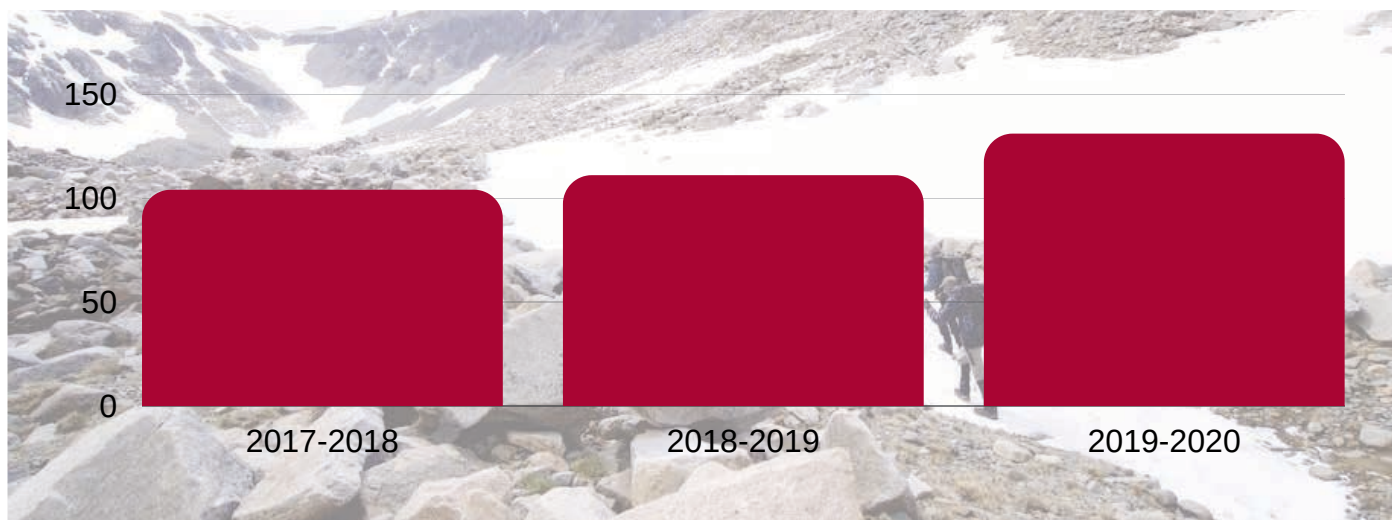
## Venture Fellows (VFs)

VFs serve as coaches and facilitators and collect feedback afterwards to ensure continuous improvement. They are also responsible for conducting information sessions, assisting with marketing efforts, and acting as the point-of-contact for all participants. VFs also participated in two trainings, each one focused on the core skills and leadership competencies required of the role:

- Conducted this year in Michaux State Forest, PA, the expedition training over fall break included a five-day, in-field training that gave VFs both the backcountry and facilitation skills that support Ventures. Eight world-class guide-educators staffed the training alongside WLV staff members.
- In November 2019, WLV staff and Venture partner Graham Charles, delivered an entirely new training developed in-house by staff. A rescue simulation was designed and used a variety of outdoor, teamwork, leadership, and communication skills to complete the mission. The second day of training took place in a classroom and focused on coaching, providing feedback, and conducting difficult conversations.

In light of the pandemic, WLV has also hosted its inaugural VF Conversation Series event titled, Leading through Uncertain Times. The event was moderated by a WG'20 grad and featured a panel of former VFs as well as Dr. Preston Cline, former Director of WLV; Senior Fellow, Center for Leadership and Change Management; and co-founder of the Mission Critical Team Initiative.

## MBA Venture Fellows Application Data: # of Applications





## William P. Lauder Wharton Leadership Fellows (LFs)

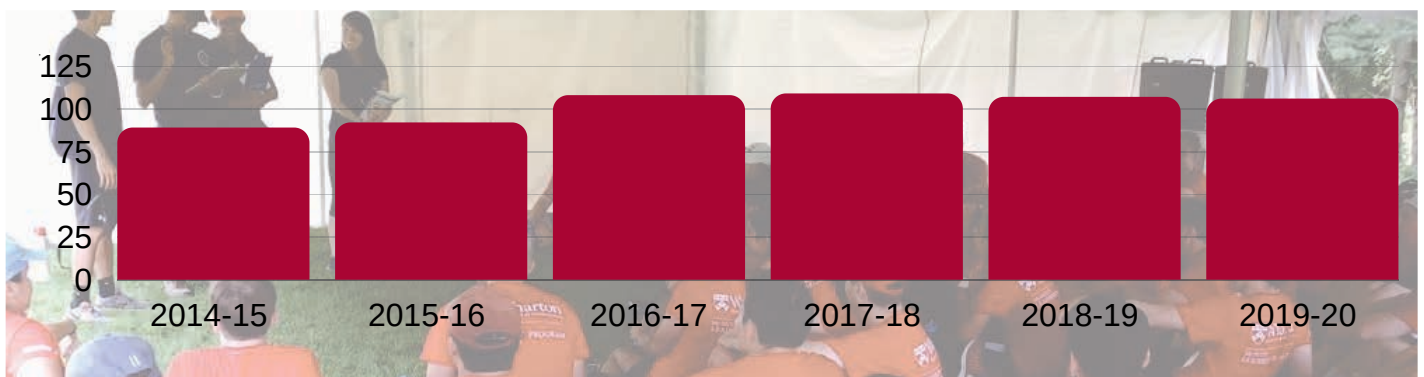
LFs mentor first-year students so that they can develop their personal leadership skills and optimize their Wharton MBA experience.

After a rigorous application and selection process, new LFs built key skills through 60+ hours of intensive training during the spring of their first year. They returned to campus in the fall of 2019 to facilitate and support the Learning Team formation process, the MGMT 610 core course, and a 360 evaluation and feedback process. Program champion William P. Lauder joined his Fellows in September for a symposium focused on leadership principles, with small-group conversations underscoring the importance of trust for team success. The LFs incorporated this lesson and others into periodic developmental events they plan for the first-year MBA cohorts throughout the year.

Although COVID-19 halted in-person meetings, the Leadership Fellows pivoted to hosting virtual meetups, including one-on-one outreach to first-year students, online Reciprocity Rings, and a session on health and wellness. For the final biweekly Morning Meeting, Mr. Lauder marked the upcoming graduation of second-year fellows with best practices for leading transformation through uncertainty as well as a moment of celebratory reflection on 18 months of learning and growing together.

Because of the global COVID-19 pandemic, the new class of 48 fellows met for the first time virtually and completed all training in a remote format. Essential program trainings were redesigned to ensure LFs strengthened the competencies needed for the role, whether in person or virtual: curiosity and development, team building, effective communication, instilling trust, managing conflict, positivity, and action-orientation. Through creative experimentation, flexible scheduling, and consistent opportunities for small-group discussions, the LFs gained comfort and proficiency making connections and facilitating groups online. In addition to the Leadership Fellows Book Club, the LFs self-organized peer coaching practice for the summer months.

### William P. Lauder Leadership Fellows Application Data: # of Applications





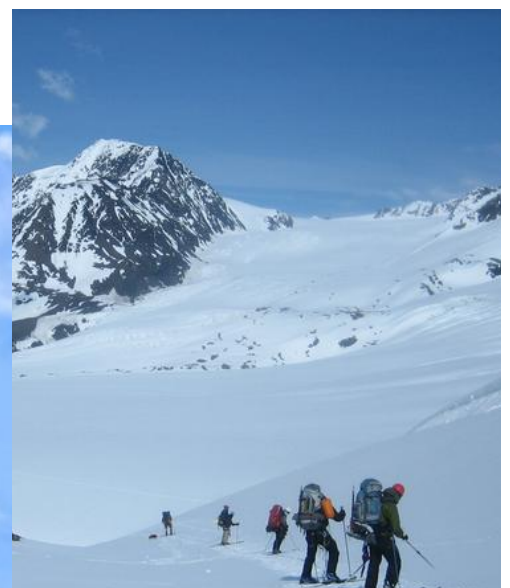


## MBA Ventures — Expeditions and Intensives

This year, the MBA Ventures program ran four Expeditions and two Intensives to diverse locations all around the globe. Facilitating self-discovery, leadership, and character development, WLV enable our students to step out of their comfort zone, exceed personal limitations, and experience leadership firsthand. The 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.

There were four Expeditions\* offered this year: Andes Mountaineering, Antarctica Trekking, Tall Ships Sailing in New Zealand, and Isla Navarino in Chile over the Winter Break. Students also had a choice of two Intensives\*: the Quantico Military Simulation and the FDNY Firefighter Simulation.

\*Wharton Leadership Ventures were unable to run Spring Expeditions and Intensives because of the pandemic.

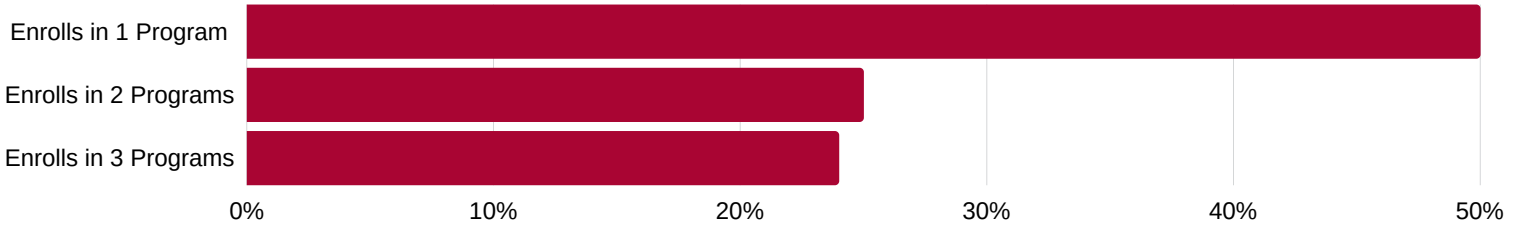






## MBA Student Data

Unique MBA Student Participants: 950



Opportunities/Class Size	2017-2018	2018-2019	2019-2020
Unique MBA participants	1241	972	950
MBA Enroll in 1 program	36%	57%	50%
MBA Enroll in 2 programs	31%	26%	25%
MBA Enroll in 3 programs	33%	17%	24%
Class size 2020		875	857
Class size 2021			873
MGMT 610 Seats Filled	854	864	856
MGMT 610 Opportunities	1	1	1
MGMT 896 Seats Filled	48	50	50
MGMT 896 Opportunities	1	1	1
ECFP Seats Filled	378	265	275
ECFP Opportunities	1	1	2
P3 Groups Seats Filled	369	388	320
P3 Groups Opportunities	1	1	2
Expeditions Seats Filled	222	218	114
Expeditions Opportunities	10	10	4
Intensives Seats Filled	267	228	100
Intensives Opportunities	5	4	2
Workshops Seats Filled		257	401
Workshops Opportunities		8	12
Leadership Fellows Seats Filled	48	48	48
Leadership Fellows Opportunities	1	1	1
Lipman Fellows Seats Filled	16	16	15
Lipman Fellows Opportunities	1	1	1
NPB Fellows Seats Filled	43	43	37
NPB Fellows Opportunities	1	1	1
Venture Fellows Seats Filled	29	28	28
Venture Fellows Opportunities	1	1	1
A@W Committee Seats Filled	4	4	8
A@W Committee Opportunities	1	1	1
P3 Facilitators Seats Filled	79	67	37
P3 Facilitators Opportunities	2	2	2
<b>Total Seats Filled</b>		2476	2289
<b>Total Opportunities</b>		33	31

# STUDENT VOICES

"I have truly enjoyed my experience with MLP. NBF and P3 have helped me grow as a member of a team and as a leader. They have also helped me form bonds with a lot of wonderful people."

"I think McNulty is one of Wharton's biggest assets."

"MLP has been a large and wildly important part of my time here at Wharton. I couldn't be more grateful."

"As a non-Wharton student, I appreciated the opportunity to participate in MLP and work together with students from other schools."

"I had such a great experience with the Nonprofit Board Fellows Program; and now have led a really enriching program as a result!"



# EXECUTIVE MBA PROGRAM OVERVIEW

MLP customizes innovative leadership development opportunities for our executive MBAs and working professionals. For example, students in the Executive MBA Program (WEMBA East and WEMBA West) have access to six personalized sessions with a coach as part of the Executive Coaching and Feedback Program.

In the 2019-2020 year, both the WEMBA East and WEMBA West programs had the chance to focus on teamwork and participate in stretch experiences, including the Leadership Ventures' FDNY Intensive, Quantico Intensive, Rowing Intensive, Tall Ships Sailing Expedition, and the Leadership Ventures WEMBA-only Alaska Venture.

The Capstone, open to all students and held on the last day of classes before graduation, served as a final day of reflection for the WEMBA experience. Members of the Class 41 were brought together as a full class to share their reflections and say 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 the graduating class committed to carrying their Wharton experience forward into the future and explored how their lives are, and will be, different as a result of attending the WEMBA program.

The total class size for the 2019-2020 year was:  
Class of 42 Philadelphia: 117 students  
Class of 42 San Francisco: 103 students  
Class of 43 Philadelphia: 119 students  
Class of 43 San Francisco: 102 students







## WEMBA Workshops

On March 31, 2020, MLP launched the Virtual Leadership Training Series (VLTS) to all four WEMBA classes. Restrictions on travel and in-person gatherings during the COVID-19 pandemic resulted in the postponement of the Leadership Development Workshop Series during the spring. We developed the VLTS to meet continued student demand for single-session, open-enrollment leadership development programming. We built a schedule of six 90-minute programs in collaboration with Wharton MBA alumni, instructors from Wharton's Aresty Institute of Executive Education, and outside partners.

In June 2020, WEMBA 45 students from both coasts were invited to join a virtual pilot of the P3: Purpose, Passion, Principles program. P3 is a set of six small-group conversations that provide a deep dive into the topics of happiness and success. Through these discussions, students explore personal definitions of success and happiness, delve into how past experience has shaped these definitions, and examine what these definitions mean for their day-to-day decision-making and behaviors.

Mixed-coast teams of five to six students read *Springboard* by Professor Richard Shell and prepared for their weekly discussions with McNulty-developed exercises. Participants practice their facilitation skills by leading a weekly session. At the end of the program, students capture a set of three to five values to carry with them during the remainder of their WEMBA experience and beyond.





## WEMBA Data

Opportunities/Class Size	2017-2018	2018-2019	2019-2020
SF 43 Class Size		102	102
SF 44 Class Size			109
SF 45 Class Size			112
PHL 43 Class Size		120	119
PHL 44 Class Size			118
PHL 45 Class Size			117
Opportunities	12	18	18
Seats Filled	586	596	487
Capstone PHL Seats Filled	120	118	
Capstone PHL Opportunities	1	1	
Capstone SF Seats Filled	97	107	
Capstone SF Opportunities	1	1	
Coaching PHL Seats Filled	135	61	74
Coaching PHL Opportunities	2	1	1
Coaching SF Seats Filled	119	35	66
Coaching SF Opportunities	2	1	1
Expeditions PHL & SF Seats Filled	8	13	11
Expeditions PHL & SF Opportunities	1	2	2
Intensives PHL & SF Seats Filled		38	41
Intensives PHL & SF Opportunities		5	3
Workshops PHL Seats Filled		94	51
Workshops PHL Opportunities		4	4
Workshops SF Seats Filled	57	130	44
Workshops SF Opportunities	2	3	1
Workshops Virtual Seats Filled			200
Workshops Virtual Opportunities			6
<b>Total Seats Filled</b>		596	487
<b>Total Opportunities</b>		18	18

# STUDENT VOICES

"I become more aware of my own approach to different aspects in the work setting, such as decision making, conflict management and etc. And I tend to reflect and strategize now before I then react and lead the team."

"Applying the principles learned during my coaching sessions to real-time work activities was extremely beneficial. We worked on issues that were very pertinent to my life at the time — but that also applied very broadly."

"I am really happy that I signed up for coaching and strongly recommend the program for future students. It's an invaluable opportunity to work with an experienced executive coach and develop leadership abilities. The program is a wonderful addition to the WEMBA curriculum."

"I was reminded during the negotiations workshop that when considering planning for long term it's more important to manage uncertainty than to predict the future."



# EXECUTIVE EDUCATION OVERVIEW

During the 2019-2020 academic year, the McNulty Leadership Program supported Wharton Executive Education programs that provided \$30 million in revenue. Through this partnership, MLP provides program design, instruction, and executive coaching across a range of senior management programs, bundled executive education programs, standard open enrollment programs, and custom programs for organizations.

Executive Education programs began to cancel in March, and have been suspended in-person since March 2020. MLP has supported new outreach and delivery methods, including Wharton Live (weekly seminars delivered virtually by Wharton faculty and staff) and new virtual program design. Executive coaching quickly adapted to virtual delivery and continued to support its new and existing clients.

## Senior Management Programs

We completed our 10th cohort of the five-week Advanced Management Program in October 2019, graduating 39 executives and new alumni of the Wharton School. In 2019, new program elements included an integrative capstone retreat at the Mohonk Mountain House that included new Wharton Leadership Ventures features such as mountain biking, hiking, bouldering, rappelling, and rock climbing.

In addition, we completed the inaugural China Advanced Management Program, graduating 28 Chinese executives through this first-ever adaptation of AMP into a modular, simultaneous-translation program.



Finally, MLP designed and delivered the team and individual coaching experience for participants in the two-week simulation-based Executive Development Program in September and November of 2019. Over the five-year partnership, the Wharton Executive Education ranking for senior management programs has increased from #22 to #7 in the Financial Times.

## Bundled Executive Programs

The General Management Program bundles six one-week open enrollment programs with executive coaching delivered by MLP's executive coaching bench.

The Advanced Finance Program bundles 6 one-week finance open enrollment programs and also provides executive coaching delivered by MLP's executive coaching bench.



## Custom Programs

MLP staff, Senior Fellows, and executive coaches partner with faculty to deliver the following custom programs for organizations.

### **Estée Lauder**

MLP delivered its experiential Leadership Navigation Challenge to highlight the challenges and opportunities of collaboration across and competition between teams.

### **First Republic Bank**

MLP supported two deliveries of a custom program that featured a Leadership Navigation Challenge held at the Presidio in San Francisco and a brand-new module that used a Virtual Reality exercise to highlight effective team leadership skills.

### **Kuwait Foundation for the Advancement of Science**

MLP provided core instruction, team coaching, and action learning projects for this three-module program focused on innovation and delivered in Kuwait City and San Francisco.

### **Shanghai University Undergraduate Program**

MLP supported this two-week engagement that served 30 undergraduate students in July 2019. The program combined classroom lectures, experiential activities, and touring of Philadelphia's cultural and historical landmarks to create an immersive learning platform for these talented students.

### **Twitter**

MLP delivered its experiential Leadership Navigation Challenge to highlight the challenges and opportunities of collaboration across and competition between teams.



**Wharton**  
UNIVERSITY of PENNSYLVANIA

# STUDENT VOICES

"I am extremely happy with AMP. Great experience and will certainly recommend to other colleagues, including friends."

"I really loved the multi-dimensional approach and build of the program. The team building was excellent."

"The program is amazing and honestly transformational."

"A well-managed holistic program with excellent professors and guests."

"Great experience with enough time to enjoy real teamwork with international executives and get supported by a great Wharton team."





## CENTER FOR LEADERSHIP AND 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 Organizational Behavior Conference was held in November. This conference featured presenters drawn from top junior faculty working at the cutting edge of research in the field of organizational behavior. The conference is led by Associate Professor Drew Carton and 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.

Senior Fellows are appointed by the Center for Leadership and Change Management to support the Center with a variety of research initiatives, teachings, and global projects. They provide an essential link between the Wharton community and the foremost leaders in business, public service, and government.



FK Day  
Co-Founder & Board Chair, World Bank

Anne Greenhalgh  
Deputy Director, McNulty Leadership

# LIPMAN FAMILY PRIZE OVERVIEW

## 9th Lipman Family Prize Awarding

In its ninth year, the Barry & Marie Lipman Family Prize received applications from over 130 organizations from around the world, 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. While the global pandemic prevented the Lipman Family Prize community from gathering for the annual award ceremony in the Spring, the Prize celebrated the honorees this year virtually through a video announcement featuring Barry & Marie Lipman and with remarks from the winning organization.

The 2020 top honoree prize of \$250,000 in unrestricted funds was awarded to Sanku (Project Healthy Children), a nonprofit organization that scales technology and business solutions that put critical nutrients into the food that hundreds of millions of malnourished people eat. Sanku has refined fortification technologies and developed new economic models for sustaining rural fortification across East and South Africa. Sanku's smart dosifier technology, which adds a precise amount of critical nutrients to flour, aims to end malnutrition and reach 100 million people by the year 2025.

The Lipman Family Prize also honored Digital Green and Trees for the Future each with \$100,000 in unrestricted funds, marking the first time in the history of the prize that all three honorees have been awarded six-figure monetary prizes.

- Digital Green's mission is to empower smallholder farmers to lift themselves out of poverty by harnessing the power of technology and grassroots-level partnerships.
- Through seed distribution, agroforestry training, and in-country technical assistance, Trees for the Future empowers rural groups to restore tree cover to the lands, protects the environment, and helps to preserve traditional livelihoods and cultures for generations.



Digital Green





## THE BEACON AWARDS

### The Beacon Awards

The Lipman Family Prize also launched the Beacon Awards this year to reward and support two previous Lipman Prize honorees who have demonstrated success in scaling up their social impact efforts. The Beacon Awards was established to continue investing in the promising practices and leaders that join the Lipman Family Prize community each year. The Beacon Awards provides a follow-up opportunity to encourage, highlight, and reward honorees that are collaborating with others to advance collective knowledge and improve the quality of social impact work.

While the annual Lipman Family Prize identifies groundbreaking innovations, the Beacon Awards seeks to understand each organization as a vehicle for change and expanded social impact. The criteria for choosing winners are designed to value transferability and knowledge sharing as a method of scaling impact; identify leaders who are pushing the sector forward; and highlight organizations with continued impact that are poised to expand to another level.

The Beacon Awards was only open to the 18 past honorees of the Lipman Family Prize from 2012 to 2017. Fifteen eligible organizations applied for this new award and participated in a rigorous application process that concluded in June 2020.

In July 2020, the Lipman Family Prize announced that Hope Enterprise Corporation and CareMessage are the two winners of the Beacon Awards. Each organization will receive \$250,000 in unrestricted funds. Three additional organizations were named finalists for the Beacon Awards: READ Global, Soccer Without Borders, and iDE.

- Hope Enterprise Corporation (HOPE), a 2016 Lipman Family Prize honoree, works to strengthen communities, build assets, and improve lives in economically distressed areas of the Deep South by providing access to high-quality financial products and related services.
- CareMessage, a 2015 Lipman Family Prize honoree, works to bridge the gap between healthcare and technology so all people regardless of income or background can achieve equitable health outcomes.

A special award ceremony was scheduled to take place at the now cancelled Wharton Global Forum in October 2020. The Lipman Family Prize is currently working on plans to virtually celebrate the two winners of the Beacon Awards.





## Partnerships

### Women's Leadership and Gender Equity Initiatives

In partnership with the McNulty Foundation, MLP is currently investing in the expansion of the Women's Leadership and Gender Equity initiatives by elevating research, developing programs, and connecting networks. The approach to program development is holistic, with a priority on faculty oversight, evidence-based programming, and inclusive environments.

The Launch Committee for this set of important issues achieved three important milestones during the 2020-2021 academic year: (1) key staffing investments and commitments were finalized, including a faculty chair (Nancy Rothbard, also MGMT department chair), a post-doctoral fellowship, and a graduate assistantship, (2) the mission and vision for the initiatives (included below) were developed and presented to the Leadership Advisory Board in February 2020; and (3) strategic partnerships and collaborations were fortified and expanded to deliver new programs to students.

#### **MISSION:**

- The Women's Leadership Initiatives within the McNulty Leadership Program at Wharton cultivate leaders who promote gender equity and catalyze change. We create knowledge, build awareness, and strengthen skills through research, programs, and global networks.

#### **VISION:**

- We envision a world in which leaders influenced by Wharton are role models for gender equity in their lives, organizations, and communities.

Events of the past year included an MBA women's workshop on building personal leadership brands; an all-women's Executive Education alumni networking panel; an all-women's golf workshop; a fireside chat with Elizabeth Vale and Carla Harris; a lunch & learn addressing the necessity of work/life balance with Randi Brosterman and Bob Hutches; and talks with female leaders such as Amity Milhiser of PwC, Valerie Jarrett, and Melinda Gates.



## Partnerships

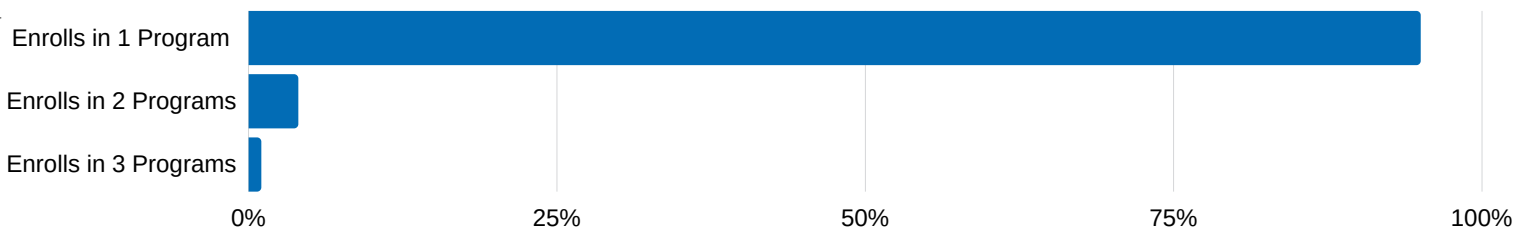
### PENN ATHLETICS WHARTON LEADERSHIP ACADEMY (PAWLA)

This innovative program — a partnership between Penn Athletics and MLP — was conceived by David Pottruck, C’70, WG’72, to foster the leadership abilities of Penn student-athletes.

Beginning in a pilot phase that runs through 2021, the academy’s curriculum includes lectures, workshops, personal assessments, and experiential learning opportunities. The Wharton Leadership Ventures team joined the Academy as instructors, and designed a new Intensive, the Rescue Mission — an overnight team-based challenge on the grounds of the Mohonk Mountain House in upstate New York.

All incoming freshmen student-athletes participate in the program. After freshman year, student-athletes continue 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 symbiotically 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.

**Unique PAWLA Student Participants: 507**





## Partnerships

### People Lab

People Lab is a collaborative effort between MLP and Wharton People Analytics (WPA). Catalyzed with a gift from Rob Katz, WG'88, 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 2014 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 team outlined the personalization initiative and presented the assessment center concept to the Wharton Dean's office and the Graduate Executive Board.

After an intensive development effort, People Lab launched an interactive platform featuring the research of Angela Duckworth (grit), Adam Grant (generosity), and Cade Massey (coachability) to the first user group of 200+ MBA students in the spring of 2020. In the fall of 2020, the next phase of the platform will add the MBA 360, a 7-factor leadership competency assessment, and the Leverage Inventory, a power and influence assessment.





# STRATEGIC INITIATIVES

## Collaborations

### Aspen Institute

Co-hosted by the Wharton School, Bucknell University, and Franklin & Marshall College, the 8th Annual Convening of the Aspen Undergraduate Consortium has been postponed until June 2021 because of the pandemic. In the meantime, the Aspen Institute consulted with the hosts from all three schools — Anne Greenhalgh, Doug Allen, and Jeff Nesteruk, respectively — and hosted two virtual panels in June 2019.

### Edward S. Cooper Program Leadership Society

MLP convened the final cohort of this leadership society for a multi-day program in the fall of 2019. More than 40 faculty and researchers from Penn Medicine met for a program focused on leadership identity, emotional intelligence, communication, and coaching skills. The Society, founded by Dr. Carmen Guerra in 2015 with support from Penn Medicine and the Provost's Office, is named for Dr. Cooper, the first tenured African American doctor at Penn, and it supports doctors and faculty from underrepresented social identity groups as they are called upon to lead.

### IDEAS Lab

MLP 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 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.



## Collaborations

### **Penn Orthopedic Program**

The Penn Medicine Department of Orthopedic Surgery partnered with MLP for a program entitled, "Ethics, Integrity, and Mission-Critical Leadership in Hard Times." Held on June 12, 2020, 40 orthopedic residents came together for a day of leadership training led by Wharton Professors Thomas Donaldson and Mike Useem as well as Senior Fellow Dr. Preston Cline.

### **Penn Veterinary Program**

The collaboration between the Penn Vet School and the McNulty Leadership Program features four-day professional development seminars for 36 members of the Chinese pork industry. These seminars were cancelled last year, and the grantors — the Provost's Office at Penn and Zoetis — have extended the grant for the 2020-2021 academic year. The principal investigators plan to resume the professional development seminars next year.

### **Philadelphia Youth Basketball Leadership Development Academy**

A community leadership initiative generated from the ongoing partnership between Philadelphia Youth Basketball and MLP, this pilot program was designed and delivered to 16 African American young professionals serving as staff and volunteer leaders. Run between February and July of 2020, the academy combined sessions on effective teamwork, communication, problem solving, coaching models and organizational learning. Adapted for virtual delivery in response to COVID-19, the program also incorporated current events including policy creation, corporate response, and public perceptions spurred by both the pandemic and widespread racial unrest in the U.S.

# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

*\*signifies new board member in 2019-2020*

*\*\*signifies transition in board member role in 2019-2020*



**DEEPAK ADVANI**

*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 also led IBM's predictive analytics business.

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

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



**MARIA BARTIROMO**

*Anchor and Global Markets Editor for FOX Business Network*

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 prime time 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. During her 20-year tenure as the face of CNBC, she launched the network's morning program, Squawk Box; anchored The Closing Bell with Maria Bartiromo; and was the anchor and managing editor of the nationally syndicated On the Money with Maria Bartiromo, formerly The Wall Street Journal Report with Maria Bartiromo.

In 2009, the Financial Times named her one of the "50 Faces That Shaped the Decade," and she was the first female journalist to be inducted into the Cable Hall of Fame Class of 2011. In 2016 she was inducted by the Library of American Broadcasting as one of its Giants of Broadcasting & Electronic Arts. Bartiromo is the author of several books, including The Weekend That Changed Wall Street, published by Portfolio / Penguin, and The 10 Laws of Enduring Success, published by Random House; both were released in 2010. Bartiromo is a member of the Board of Trustees of New York University, the Council on Foreign Relations, the Economic Club of New York and the Board of Directors of The National Italian American Foundation (NIAF).

She graduated from New York University, where she studied journalism and economics. She also served as an adjunct professor at NYU Stern School of Business for the fall semesters of 2010 through 2013.



**GRANT BEHRMAN, WG'77**

*Co-Founder, 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).



# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

*\*signifies new board member in 2019-2020*

*\*\*signifies transition in board member role in 2019-2020*



**JONATHAN I. BERGER, W'91**

*Co-founder, Chief Executive and Chief Investment Officer, Birch Grove Capital*

Jonathan is the co-founder, Chief Executive and Chief Investment Officer of Birch Grove Capital. Jonathan 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, Jonathan 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.

Jonathan holds a B.S. in Economics with a concentration in Finance from the Wharton School of the University of Pennsylvania.



**RANDI BROSTERMAN HUTCHENS, W'81, WG'88**

*Principal (Retired) Deloitte Consulting LLP*

Randi 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.

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 has been a 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 married and has 2 children who are currently in college.

# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

*\*signifies new board member in 2019-2020*

*\*\*signifies transition in board member role in 2019-2020*



**ROGER W. CRANDALL,  
WG'02**

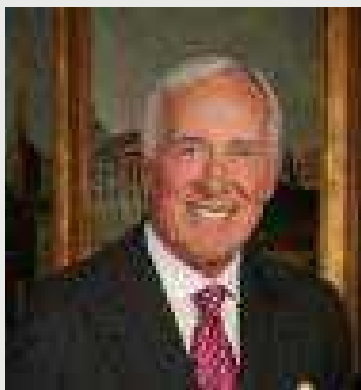
*Chairman and Chief  
Executive Officer,  
Massachusetts Mutual Life  
Insurance Company*

Roger is Chairman 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, Roger served as President and Chief Operating Officer.

Roger 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, Roger 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. Roger 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.

Roger, 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.



**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 master's 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 3-year initiative focused on providing creative financing to meet the need to overhaul a significant portion of the physical infrastructure throughout the country.

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

# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

*\*signifies new board member in 2019-2020*

*\*\*signifies transition in board member role in 2019-2020*



**WILLIAM P. EGAN, WG'69**

*Founder and General Partner, Alta Communications and Marion Equity Partners*

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 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.

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



**THOMAS P. GERRITY, HON'90**

*Joseph Aresty Professor of Management, and Dean Emeritus, The Wharton School, University of Pennsylvania*

Thomas 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. Thomas also served as the 11th Dean of the Wharton School for the nine years from 1990 to 1999, leading Wharton through a period of highly recognized innovation and advancement.

Prior to coming to Wharton, Thomas 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.

Thomas 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.



**ALEX GORSKY, WG'96**

*CEO and Chairman, Johnson & Johnson*

Alex 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 and spent six years in the U.S. Army, finishing his military career with the rank of Captain. Alex earned an MBA from the Wharton School of the University of Pennsylvania.

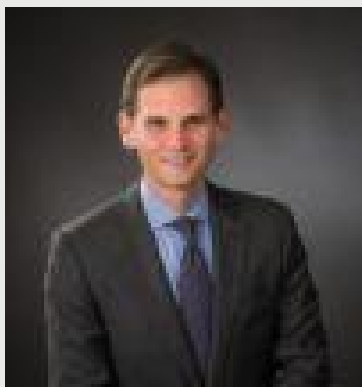
Alex serves on the board of directors of the Doylestown Hospital in Doylestown, PA. He and his wife, Pat, have a son, Nicholas, at the University of Pennsylvania.



# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

*\*signifies new board member in 2019-2020*

*\*\*signifies transition in board member role in 2019-2020*



**DAVID HESS, W'97**  
*Partner, Centerview Partners*

David 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), and their three children.



**LINDA JOHNSON, WG'96\***  
*President & CEO of Brooklyn Public Library*

Linda is President and CEO of Brooklyn Public Library (BPL), which serves more than 2.5 million residents. Linda is focused on building BPL's brand, presence, and position in the community, on creating strategies to identify and engage diverse constituencies, and on collaborating with community organizations to expand services while improving library operations. Prior to being named the President of BPL, Linda was Interim President and CEO of the National Constitution Center, where she was responsible for reorganizing, streamlining, and stabilizing the institution on a transitional basis after the unexpected departure of two previous CEOs. Before her appointment to the National Constitution Center, Linda was CEO of the Free Library of Philadelphia Foundation, where she led a capital campaign to finance renovations of the Library's main branch. She oversaw the Library's annual giving campaigns and was responsible for the One Book, One Philadelphia program and the Free Library Festival.

Before moving into non-profit work, Linda spent the majority of her business career in the private sector, first as an attorney. She made a departure from law practice in 1990 to join JCI Data, a database management provider for magazines and direct marketers. Linda led several divisions of that company, including customer services and sales. She was named President of Worlco Data Systems (a JCI affiliate) in 1993 and became President of JCI in 1994. Linda is also Charter Trustee of Hamilton College, Chair of the Board of Sing for Hope, and Trustee of the Curtis Institute of Music. She is also Advisory Director on the Board of the Metropolitan Opera. Linda holds an MBA from Wharton (WEMBA), a JD from Suffolk University, and a BA from Hamilton College.



**Rob Katz, W'88**  
*Chairman of the Board of Directors and Chief Executive Officer, Vail Resorts*

Rob 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.

# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

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**PEGGY KOENIG, WG'86**

*Managing Partner and  
Co-Chief Executive Officer,  
ABRY Partners, LLC.*

Peggy 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. Peggy joined ABRY in 1993 as a Partner when the firm organized its first \$250 million buyout fund. Peggy 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).

Peggy 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.

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.

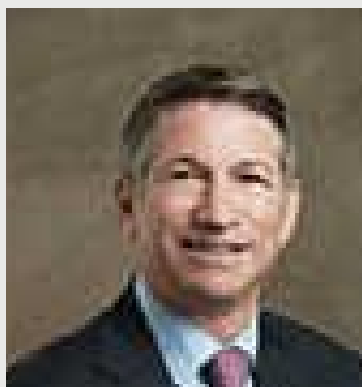


**SHERVIN KORANGY, W'96**

*President and Chief  
Executive Officer, BVI Medical*

Shervin is the President & CEO of BVI Medical. BVI is a global ophthalmic medical device manufacturer with a mission to deliver high quality innovation for advancing eye surgery. BVI is a portfolio company of TPG Capital. Shervin has 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. 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 and several country and regional general management roles.

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 BVI Holdings Ltd, Hain Celestial (Nasdaq: HAIN) and Motus GI (Nasdaq: MOTS). He has formerly served on the Board of Directors for Pelican Rouge Group, Bayview Financial, and Pinnacle Foods Group. Shervin is a graduate of the Wharton School of the University of Pennsylvania.



**BRIAN KWAIT, WG'88**

*Founder and Co-President,  
Odyssey Investment Partners, LLC*

Brian 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, Brian 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, Brian 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.



# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

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**WILLIAM P. LAUDER, W'83**

*Executive Chairman of the Estée Lauder Companies Inc.*

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

Since joining the Company in 1986, William 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. William 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.

William 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, William 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.

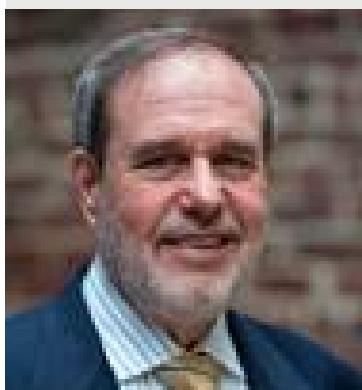


**ERIC LANE, W'96**

*Global co-head of the Investment Management Division, Goldman Sachs*

Eric 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 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 (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. 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.



# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

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**VIK MALHOTRA, WG'86**

*Chairman of the Americas & Senior Partner at McKinsey*

Vik 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 the 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'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 Emeritus of the Asia Society. Before joining McKinsey, Vik 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 received his undergraduate degree in economics from the London School of Economics.



**F. WILLIAM MCNABB III, WG'83\*\***

*Chairman of the Board, Vanguard Group*

William is the former president and chief executive officer of Vanguard, and the current chairman of the board of directors and the Vanguard funds' board of trustees. William 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, William 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. William 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.

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



**ANNE MCNULTY, WG'79**

*Co-Founder & Managing Partner of JBK Partners*

Anne 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.

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.

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.

# WHARTON LEADERSHIP ADVISORY BOARD MEMBERS

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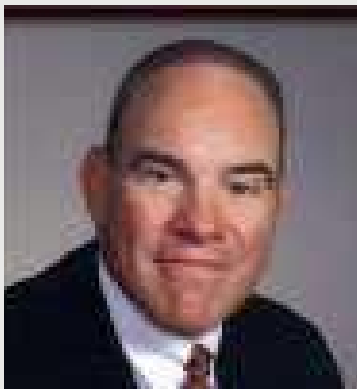
**JOHN POPPE, WG'82**  
*Managing Director in the  
Alternative Investments branch  
of the Asset Management  
Division. Credit Suisse*

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

In addition to HighTower, Dave serves on the Board of Directors of the Intel Corporation and the U.S. Ski and Snowboard Team Foundation. Dave also serves as 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. Dave was formerly a Trustee of the University of Pennsylvania and Chair of the San Francisco Committee on Jobs.

Dave 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. Dave also received the Anti-Defamation League's 2000 Torch of Liberty Award.

Dave 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.

Dave 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, Dave and his wife, Emily, reside in San Francisco and are the parents of three adult children.



**TODD THOMSON,  
WG'87\*\***  
*Founder & CEO,  
Headwaters Capital; Chairman,  
Dynasty Financial Partners*

Todd 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. Todd 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, Todd 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, Todd 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, Todd 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, Todd 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.



# SENIOR FELLOWS

*\*new fellows inducted in 2019-2020*



**PRESTON B. CLINE\***

*Co-founder and Director of Research and Education at the Mission Critical Team Institute*

Preston spent 30 years in the field of Adventure Education leading expeditions on all seven continents. These journeys became the catalyst for a lifelong academic investigation on how humans learn to interact with uncertainty. This research has resulted in a Master's of Education from the Harvard University Graduate School of Education on risk and uncertainty, and a Doctorate in Education from the University of Pennsylvania Graduate School of Education on the training and education of Mission Critical Teams: Small (4-12 agents), integrated groups of indigenously trained and educated experts that leverage tools and technology to resolve complex adaptive problems in immersive, but constrained (five minutes or less), temporal environments, where the consequence of failure can be catastrophic.

In 2018, after 10 years serving as the Director of the Wharton Leadership Ventures, Preston founded the Mission Critical Team Institute, which is an applied research institute focused on the development of an international collaborative inquiry community made up of Instructor Cadres within Military Special Operations, Emergency Medicine, Tactical Law Enforcement, Aerospace and Urban and Wilderness Fire Fighting Organizations within Australia, Canada, New Zealand, United Kingdom and the United States. When he is working with Cadre, he resides outside Philadelphia with his extraordinary spouse Amy.



**TODD HENSHAW**

*President, Leader Development Associates*

Todd 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.

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, Penske, 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 is a Fortune 100 marketing executive recognized for her strategic and innovative approach. She is a leadership consultant, executive coach and principal at Zero Point Partners. Offering programs on leadership and high-performance teams internationally, her practice focuses on helping world-class leaders make a positive impact in the private, public, and non-profit sectors.

At Wharton she instructs in Executive Education Programs, in MBA Leadership Ventures, and holds Women in Leadership workshops. Based in Jackson Hole, Wyoming, she enjoys skiing, cycling, trekking and traveling in remote regions of the world with her husband John and their family.



# SENIOR FELLOWS

*\*new fellows inducted in 2019-2020*



**MARTIN IHRIG\***

*Adjunct Professor,  
University of Pennsylvania's  
Graduate School of Education*

Martin is an adjunct associate professor at the University of Pennsylvania Graduate School of Education. He is also associate dean and clinical professor at New York University and an adjunct professor at the Wharton School of the University of Pennsylvania. As a faculty member at Penn GSE, Martin teaches in the Penn Chief Learning Officer program and the Mid-Career Doctoral Program in Educational Leadership. Also at Penn GSE, he served as the founding academic director of the nation's first executive master's in Education Entrepreneurship program.

As a faculty member at the Wharton School, Martin teaches strategy, entrepreneurship, and innovation in the open enrollment and customized programs at the Aresty Institute of Executive Education. His research and consulting focuses on the strategic and entrepreneurial management of knowledge (SEM-K), and he is the co-founder and former research director of the SEM-K initiative at Wharton's Snider Entrepreneurial Research Center.

In his position at New York University, Martin runs the Division of Programs in Business at the NYU School of Professional Studies. Martin is also the co-founder and president of I-Space Institute, an applied research and consulting venture that helps organizations create innovation growth opportunities. In addition, he has previously served as a visiting professor at Lappeenranta University of Technology in Finland. He received his Master of Business Studies from University College Dublin and his doctorate in Business Administration from Technische Universität Berlin.



**RODRIGO JORDAN**

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

Rodrigo is founding director of Vertical in Chile, an organization devoted to using the mountains as classrooms for groups ranging from company managers to school children. He also directs Fundación Vertical, the not-for-profit arm of Vertical to serve the underprivileged students of the poorest schools in Chile.

Rodrigo is an accomplished mountaineer who 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 is an executive coach, strategic leadership consultant and principal at Zero Point Partners. His expertise is leadership development, teamwork and decision-making for executives in the United States, Asia, Europe and Latin America. His practice focuses on building resilient leaders and high-functioning teams in the private, public and non-profit sectors.

He develops curriculum, leads Wharton Leadership Venture expeditions and teaches executive leadership and high-performance teams through Wharton Executive Education. John and his wife Ginny live in Jackson Hole, Wyoming, where they enjoy the benefits of mountain air and life. He is an avid skier, cyclist and interested in all things outdoors.

# SENIOR FELLOWS

*\*new fellows inducted in 2019-2020*



**CHRIS MAXWELL, G'87, LPS'09**

*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.



**F. WILLIAM MCNABB III, WG'83\***

*Former Chairman and Chief Executive Officer, Vanguard Vice Chair, Wharton Leadership Advisory Board*

William is the former chairman and chief executive officer of Vanguard. He joined Vanguard in 1986. In 2008, he became chief executive officer; in 2010, he became chairman of the board of directors and the board of trustees. He stepped down as chief executive officer at the end of 2017 and as chairman at the end of 2018. Earlier in his career, he led each of Vanguard's client-facing business divisions.

William is active in the investment management industry and served as the chairman of the Investment Company Institute's board of governors from 2013 to 2016. A board member of UnitedHealth Group and the chairman of Ernst & Young's Independent Audit Committee, he is also chairman of the board of the Zoological Society of Philadelphia, a board member of CECP: The CEO Force for Good, and a board member of the Philadelphia School Partnership.

In addition, William is the executive in residence at the Raj & Kamla Gupta Governance Institute at Drexel's LeBow College of Business and a member of the Advisory Board of the Ira M. Millstein Center for Global Markets and Corporate Ownership at Columbia Law School. He is a member of the Wharton Leadership Advisory Board of the Wharton Center for Leadership and Change Management and a member of the Wharton School's Graduate Executive Board. He also serves on the Dartmouth Athletic Advisory Board.



**MEREDITH MYERS\***

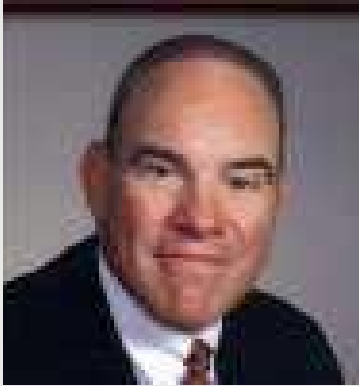
*Executive Director, Job Crafting LLC*

Meredith has served as faculty at the University of Pennsylvania since 2009, working within the Wharton School, the School of Social Policy & Practice (SP2), and the Positive Psychology Center. Meredith has won excellence in teaching awards in the Wharton School and SP2's Nonprofit Leadership Master's Program.

Outside of her university-based roles, Meredith is the Executive Director of Job Crafting LLC, which leverages cutting-edge research on the workplace to help people construct their work in ways that promote a greater sense of purpose and engagement while enhancing business results. Meredith holds a Ph.D. in Organizational Behavior from Case Western Reserve University. She completed her undergraduate studies at the University of Pennsylvania / the Wharton School, in the dual-degree Huntsman Program in International Studies and Business.

# SENIOR FELLOWS

*\*new fellows inducted in 2019-2020*



**DAVID POTTRUCK, C'70, WG'72**

*Chairman, Red Eagle Ventures and Co-Chairman, HighTower Advisors, LLC*

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

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

Dave 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. Dave 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, Dave and his wife, Emily, reside in San Francisco and are the parents of three adult children.



**GREGORY SHEA**

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

Gregory consults, teaches, researches, and writes in the areas of organizational and individual change, leadership, group effectiveness, and conflict resolution. He is an Adjunct Professor of Management at the Wharton School of the University of Pennsylvania and of its Aresty Institute of Executive Education, Adjunct Senior Fellow at the Leonard Davis Institute of Health Economics at the Wharton School, President of Shea & Associates, Inc., Senior Consultant at the Center for Applied Research, and a principal in the Coxe Group, an international consulting firm serving the design professions. He served as Academic Director for the Johnson and Johnson/Wharton Program for Health System CEOs and for fourteen years as Academic Director for the Johnson and Johnson/Wharton Fellows Program for Nurse Executives.

Gregory is a Magna Cum Laude, Phi Beta Kappa graduate of Harvard College and holds an M.Sc. in Management Studies from the London School of Economics and an M.A., M. Phil., and Ph.D. in Administrative Science from Yale University.



**NADYA K. SHMAVONIAN\***

*Director of the Nonprofit Repositioning Fund; Partner at SeaChange Capital Partners*

Nadya is the Director of the Nonprofit Repositioning Fund and a partner at SeaChange Capital Partners. The Repositioning Fund is a Philadelphia-based pooled fund of philanthropic partners that encourages and supports mergers and other types of formal, long-term strategic alliances and restructuring opportunities among nonprofit organizations in the Greater Philadelphia region. SeaChange is a New York-based nonprofit merchant bank whose mission is to enable transactions that increase the impact of nonprofits while offering leveraged opportunities for funders.

In addition to her ongoing management of the Repositioning Fund, Nadya contributes to SeaChange's national collaboration field-building and advisory services and explores potential opportunities for SeaChange to engage in projects in the Greater Philadelphia region.

Nadya holds a B.A. from the University of Chicago and an M.B.A. with a concentration in health care management from the Wharton School of the University of Pennsylvania. She was awarded the Kathleen McDonald Distinguished Alumna Award from Wharton Women in Business in 2011.



# SENIOR FELLOWS

*\*new fellows inducted in 2019-2020*



**KAT SMITHHAMMER\***

*Senior Expedition Leader,  
NOLS - National Outdoor  
Leadership School*

Kat divides her time between the custom division of the National Outdoor Leadership School (NOLS Custom Education) as a Senior Expedition Leader, and Leadership at Play, LLC. She has led over 100 wilderness expeditions in N.A., Europe, Argentina, Chile, and Australia, teaching mountaineering, whitewater canoeing and back-country skiing. Highlights include canyoneering with Shuttle Crew STS 122 during 100yr flood conditions and summiting Mt. Burney in southern Chile for the second time, 30 years after its first ascent.

A few of Kat's past clients include NASA, Google, the United Nations Development Programme, the Wharton School, Wharton Exec Ed, the Prevention Management Organization of WY, Teton Science Schools, the Kellogg Graduate School of Management, Timbuk2, Four Seasons, National Park Service, and Tata Steel.

Kat is happily married and lives in the Teton with her two dogs, Hank and Luna. She loves soaking in remote hot springs, exploring the backcountry by bike or skis, sketching, cooking and slowing down.



**FELIX STELLMASZEK**

*Senior Partner & Managing  
Director at the Boston Consulting  
Group (BCG)*

Felix is a Senior Partner & Managing Director at the Boston Consulting Group. At BCG, Felix focuses on large-scale transformation programs to optimize the strategy, operations, and organizational structures of his clients. In addition, Felix is a core member of the firm's M&A and Social Impact Practices.

Prior to joining BCG, Felix worked in the private equity division of Kleinwort Wasserstein in the U.K. and for Porsche in Germany. He currently serves on the Boards of the Atlanta International School and the American Friends of Big Change. Felix holds a Ph.D. degree with a concentration in strategic management from the University of Erlangen-Nuremberg. As part of his Ph.D. program, he was a visiting scholar at the Wharton School of the University of Pennsylvania. Additionally, he holds a double-MBA degree from the Universities of Georgia and Erlangen-Nuremberg. Felix currently resides with his wife Martina and their three children in Atlanta.



**ELIZABETH VALE**

*Senior Fellow;  
Former Executive Director,  
White House Business Council*

Elizabeth 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. 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.

# SENIOR FELLOWS

*\*new fellows inducted in 2019-2020*



**ILENE WASSERMAN**

*Wharton Executive Education  
Coach;  
President, ICW Consulting Group*

Ilene 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 Under  
Secretary of the Army*

Joseph 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 STAFF

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**MIKE USEEM**

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

Mike 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 *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 132).



**JEFF KLEIN, WG'05**

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

Jeff is the Executive Director of MLP and a Lecturer at The Wharton School and the School of Social Policy and Practice at the University of Pennsylvania.

As Executive Director, Jeff is responsible for the portfolio of curricular and co-curricular leadership development programs available to Wharton undergraduates and full-time and executive MBA students, and for directing the School's efforts to create the Wharton Global Leadership Institute. He teaches an interdisciplinary graduate level course at the University of Pennsylvania, *Leadership and Social Change*; supervises multiple Field Application Projects; and delivers a variety of workshops, seminars, and conferences for students, managers, and executives. Jeff also chairs the Steering Committee for the Lipman Family Prize. He also serves as co-host for *Leadership in Action* on SiriusXM radio channel 132.

Jeff is an honors graduate of the Wharton School, University of Pennsylvania (MBA) and Penn State University (B.A., B.S.), and is currently a doctoral student studying educational leadership. He is married to Heidi, with whom he has two kind and rambunctious children, Samantha and Jakob.



**ANNE GREENHALGH**

*Deputy Executive Director,  
McNulty Leadership Program;  
Adjunct Professor of  
Management, Wharton 101*

Anne is Deputy Executive Director of MLP where she serves as chief operating officer. As adjunct professor of management, Anne co-leads the gateway course for Wharton freshmen — WH101: *Business and You* — and is chiefly responsible for the design and delivery of co-curricular programming that supports the new academic requirement, *The Leadership Journey*. She was once voted the Best Lecturer in the Social Sciences by the entire student body at Penn, and she has won the William G. Whitney Teaching Award for Associated Faculty at Wharton on numerous occasions. Anne has also served as an advisor and consultant.

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 number of programs, including the China Advanced Management Program (CHAMP), the Security Industry Institute (SII), and Merck. Along with Jeff Klein and Mike Useem, Anne is co-host of "*Leadership in Action*" on SXM Business Radio. Anne's research and publications reflect her dedication to leadership and management education, especially at the undergraduate level.



# MCNULTY LEADERSHIP PROGRAM STAFF

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**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 (now known as Lincoln Financial Group), where she managed a team of seven retirement administrators, helped with marketing retirement products, was 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, and 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, Wilma attended Pierce College, receiving her Bachelor's degree in Paralegal Studies. She completed her Masters of Science in Legal Studies in 2016.



**KELLY BUSCH**

*Events Manager*

Kelly is the Events Manager for MLP 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 a 2020 graduate of the Master of Organizational Dynamics program at the University of Pennsylvania.



**ERICA R. CASTILLO**

*Business Administrator*

Erica is a Business Administrator, overseeing all financial operations of MLP. Before coming to MLP, 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 Philadelphia and enjoys traveling, music, cooking, and reality TV.

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**TIA DORSEY**

*Financial Coordinator*

Tia now serves as the Financial Coordinator for MLP. She originally joined MLP as Coordinator for Wharton Leadership Ventures; she managed the financials, web development, and logistics and worked closely with Venture Fellows and coordinators at the MBA level.

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.

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 in first through 12th grade. 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 the Intensives, Expeditions, and Fellowships. Prior to joining MLP, she managed the On-Campus Recruiting Suite on behalf of MBA Career Management. She comes to Wharton following a career in the craft beer and hospitality industries.

A proud Philadelphia native and Penn C'05 grad, Christine lives in Fishtown with her dog, Hawkeye. She frequently travels to New Orleans, loves to read non-fiction, and can usually be seen running on the Schuylkill River Trail training for an upcoming race.



**KATE FITZGERALD**

*Director, Marketing & Communications*

Kate is the Director of Marketing & Communication, responsible for all marketing and Communications activities across the Center, MLP, and the Lipman Family Prize. Her role includes development and implementation of a strategic marketing plan and overall brand identity. She oversees the ongoing maintenance of multiple media channels, including the Center and Program websites, the MLP and Lipman Prize social media presences 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 and an M.A. in Marketing and Advertising from Emerson College. She is a 2020 summa cum laude graduate of the Master of Organizational Dynamics program at the University of Pennsylvania.

Kate comes from a 20+ year career in corporate marketing, with a focus on identity branding and messaging. Kate lives outside of Philadelphia and cherishes her time with her two children, Erin and Brendan. In her "free time," Kate is an avid runner, having completed five marathons and many sprint triathlons.

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**SARAH GOLDSMITH**

*Program Manager*

Sarah serves as a program manager on MBA leadership and talent development programming; supporting MGMT 610, ECFP, and P3. With experience across institutional, corporate, commercial, and non-profit sectors, Sarah joined the McNulty Leadership Program as a coordinator in 2017.

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\*\***

*Associate Director, People Lab*

Emily serves as an Associate Director for Wharton's People Lab and women's leadership initiatives. Previously, she was the Program Manager for the Nonprofit Board Fellows program and civic initiatives within the McNulty Leadership Program.

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 farmed, bought, sold, imported, and worked on public policy for food and agriculture.

She received her BA in Political Science and Spanish from Hamilton College and a MA in Geography and Urban Studies from Temple University. She is an amateur gardener, chef, and cyclist.



**UMI HOWARD\*\***

*Senior Director*

Umi 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. In January 2019, Umi has taken a new position as Senior Director of MLP. Umi is responsible for developing and executing an external strategy for Wharton's leadership initiatives, in partnership with Wharton Executive Education and Wharton External Affairs.

Key components of the strategy include the stewardship of key donors, development of corporate and foundation partnerships, and the design of executive and public programs in support of the School's revenue-generating and philanthropic goals. He also leads our portfolio of civic leadership programs, including the Lipman Family Prize, the Lipman Fellows Program, and the Nonprofit Board Fellows Program.



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**CLAIR JOHNSON\***

*Associate Director, Data and 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 reality TV. Relocating from San Diego to be closer to family, Clair has settled in the Haddonfield area of New Jersey.



**LYNN KRAGE**

*Director, MBA Leadership and Talent Development*

Lynn is a Senior Director and a Lecturer in the Management Department. She and her team are responsible for designing and implementing the portfolio of academic and co-curricular leadership development programs for the Wharton full-time and executive MBA population. She created, and now leads, the Wharton Executive Coaching and Feedback Program. The Coaching Program employs 70+ executive coaches to provide executive coaching to 500+ full-time and executive MBA students, participants in the Executive Development Program as well as the General Management and Advanced Finance Programs at Wharton Executive Education.

Lynn leads a team with responsibility for the design and delivery of the MBA Learning Team Experience, the William P. Lauder Leadership Fellows program, MGMT 610 delivery, the P3: Purpose, Passion and Principles Groups, Leadership Development Workshops and all leadership development programming for the MBA for Executives population.

Lynn received an MSOD in Organization Consulting and Executive Coaching from the University of Pennsylvania, an MA in Sociology from New York University and a BA from the State University of New York at Geneseo. She attained a Certificate of Human Resource Management from the Wharton School and certification in numerous assessments including the Hogan, CCL's Benchmarks and the MSCEIT.



**DAN KAUFMAN**

*Associate Director, Nonprofit Board Fellows Program*

Dan is the Associate Director for the Nonprofit Board Leadership Program and is responsible for student programming related to leadership in the local community. He also manages partnerships with more than 60 nonprofit organizations in the Delaware Valley.

Dan came to the Wharton Leadership Program from Congreso de Latinos Unidos, where he managed the growth and development of the agency's institutional partnership with Harcum College. Before Congreso, he taught high school English in Camden, New Jersey through Teach For America. He remains connected to the communities he has worked in, and since 2011 has served on the board of directors of MIMIC, a North Philadelphia nonprofit focused on mentoring and engaging high-risk youth.

He graduated from the Pennsylvania State University with a degree in English and received a Master's in Nonprofit/NGO Leadership at Penn's School of Social Policy and Practice. He is an avid trail runner and spends time outside of work running in the Wissahickon with his wife Theresa and their daughters, Rosie and Lily.

# MCNULTY LEADERSHIP PROGRAM STAFF

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**GWENDOLYN MCDAY**

*Associate Director,  
William P. Lauder  
Wharton Leadership Fellows*

Gwendolyn is a collaborative leader energized by developing vibrant, self-reflective and high-performing teams. 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.



**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.



**EURIA MIN**

*Director, Lipman Family Prize*

Euria is the Director of the Barry & 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.

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**ERICA MONTEMAYOR**

*Associate Director, Wharton Leadership Ventures*

Erica is the 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 BA in Psychology and earned her master's degree in Organizational Dynamics from the University of Pennsylvania.



**MEGAN O'MALLEY**

*Program Manager, Management 610 and Organizational Behavior Conference*

Megan is responsible for the management, planning, and delivery of MGMT 610 and the annual Wharton Organizational Behavior Conference. She also supports the programming for MGMT 896, IDEAS Lab, and the Center for Leadership and Change Management Research Grant Program.

Prior to joining MLP, 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 Mantua, NJ with her husband and their children Olivia, Grace, and Owen.



**RIDHDHI PARMAR\***

*Program Manager, Nonprofit Board Fellows Program*

Ridhdhi serves as the Program Manager for the Nonprofit Board Fellows program and supports the MLP's civic initiatives as well as business development. Ridhdhi has an extensive background in the nonprofit sector including direct service within the youth mentorship and nutrition education spaces, as well as volunteer and intern management.

Ridhdhi lives in South Philadelphia with her partner Matt. She is a 2013 graduate of the University of Vermont, where she received a B.S. in Nutrition & Food Sciences and Community & International Development. Ridhdhi can often be found traveling throughout the New England region visiting family and friends, experimenting with new recipes, catching up on her favorite shows, and exploring the nooks and crannies of Philadelphia.



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**MONICA PETERS**

*Program Manager, William P.  
Lauder Leadership Fellows*

Monica is the Program Manager for the William P. Lauder Leadership Fellows and has taken the lead on P3 going forward. Monica comes to MLP 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*

Michael 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 has been with Wharton for nearly 20 years. 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 for the Management Department affiliated Centers and Programs, and now focused on Leadership.

Tammy has a Bachelor's degree 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 dog, Juicy.

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**JULES ROY**

*Associate Director, Wharton Leadership Ventures*

Jules is the Senior Associate Director for Wharton Leadership Ventures and is the principal manager of Graduate Ventures and the Venture Fellow Development Program. He facilitates relationships with a variety of partner organizations around the world.

Jules joined the Leadership Program in March of 2015 directly after finishing 22 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 holds a B.S. from the State University of New York with a capstone study in experiential education and a Masters in Organizational Dynamics from the University of Pennsylvania. He is currently pursuing a PhD in Organizational Leadership at The Chicago School.



**JESS SEGAL**

*Director, Strategic Initiatives*

Jess develops and leads our strategic planning process and serves as the lead administrator for two new initiatives, Women's Leadership and People Lab. Jess is also a core team member of the Advanced Management Program, where she focuses on the pre- and post-program participant experience, and is the liaison between Executive Education and MLP supporting all aspects of the partnership.

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 B.S. in Marketing and earned her master's in Higher Education Management from Penn's Graduate School of Education in 2008 after a career change from healthcare marketing and consulting. 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 MLP, 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.

# MCNULTY LEADERSHIP PROGRAM STAFF

*\*signifies new employee in 2019-2020*

*\*\*signifies internal job transfer within MLP in 2019-2020*



**AMANDA ZIMMERMAN**

*Associate Director,  
Undergraduate Leadership  
Development*

Amanda is responsible for the leadership development of the TAs serving in WH 101, the gateway course for all Wharton undergraduates. In addition, she is responsible for developing relationships with regional organizations and local Penn partners in order to cultivate live case studies for the WH 01 project teams. She is also responsible for creation of co-curricular programming that supports Wharton undergraduates as they complete the new four-year requirement, "The Leadership Journey."

Amanda joined MLP 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 Master's in Organizational Dynamics from the University of Pennsylvania.