

WHARTON CEO

Coalition for Equity and Opportunity

Funding Opportunities

ACADEMIC YEAR 2023-24





In 1881, Joseph Wharton’s founding mission was to advance society by creating new wealth and economic opportunity in business and public service for all people. The School is now positioned to advance this mission on a grand scale through Wharton CEO.

By delivering impactful resources supported by a robust body of research, cultivating a generation of future business leaders, growing Wharton’s capacity to do this work, and supporting positive changes in the sector, Wharton will tackle the systemic challenges associated with economic equity and opportunity.”

ERIKA JAMES

Dean of the Wharton School

Under the leadership of Dean Erika James, the Wharton School is defining the future of business education, both in and out of the classroom.

Your support will directly impact the School’s ability to address the world’s most pressing challenges.

WHARTON DRIVES VISIONARY LEADERSHIP

Through the visionary leadership of Dean Erika James, Wharton is galvanizing a unique alliance of stakeholders to address fair economic growth and advance innovative solutions to issues of inequity in business and society. For more than 140 years, the School has led efforts to unlock the potential of leaders and to advance innovative solutions to pressing issues. Now is the time to coalesce the best minds across sectors to build inclusive economies and shape equitable societies.

Wharton is committed to identifying issues of inequity and delivering tangible solutions that will change business practices and grow economic opportunities for all.

Wharton CEO will provide leaders with the knowledge and resources to help them transform workforces and economies around the globe. To fully realize its aspirations and expand its impact, the School needs critical funding to boost actionable industry engagement, retain and recruit faculty, advance curricular activities, and fund new research to support these efforts.

The formation of [Wharton CEO](#) represents a defining moment for Wharton. As the preeminent business school in the country, Wharton will lead the business community by engaging in research that identifies solutions to issues largely captured by today's framing as diversity, equity, and inclusion (DEI) and the wealth gap.

In time, Wharton CEO will become the epicenter that integrates, promotes, and supports expansive programs and academic study of equity and opportunity in broader dimensions.

WHY WHARTON IS LEADING THIS COALITION



Wharton's breadth and depth of scholarship, societally focused and action-oriented faculty, and extensive alumni network positions the School to lead in facilitating partnerships that advance equity and create greater opportunity for all to fully engage in and contribute to society.

WHARTON CEO LAB

The CEO Lab is the exploration hub for scholars, experts, faculty, and students seeking to understand and address equity issues impacting business and society. The Lab activates opportunities for discovery between academic research and industry practice to forge transformational insights that lead to positive outcomes. The result is a virtuous cycle of knowledge sharing that will bring about momentous change within organizations and across sectors to broadly impact society.

➔ IDENTIFY NEW RESEARCH NEEDS

Effective research begins with identifying gaps in knowledge. CEO Lab collaborates with faculty experts and industry leaders to uncover areas of study needed to inform business strategy around every operational system: workforce, marketplace, and community.

➔ DRIVE INNOVATION WITH INTEGRATED RESEARCH

Issues of inequity are complex and require fresh perspectives and new methodologies to generate effective solutions. The CEO Lab is the point of convergence for Penn faculty and visiting professors to examine issues across disciplines, including healthcare, legal studies, and real estate.

➔ DELIVER EVIDENCE-BASED SOLUTIONS

Building an equitable future requires resources. CEO Lab has curated a repository of applied actionable insights. Multifaceted ideas and solutions are disseminated through academic conferences, digital communications, and focused roundtables.



The Wharton CEO Lab translates research into resources and business tools designed to help organizations advance their workforce. For example, insights from the Incentivized Resume Rating (IRR) research rendered a two-page guide on building fair and equitable hiring practices.



WHARTON COMMUNITY OF SCHOLARS

Wharton CEO is building a robust community of cross-sector researchers, practitioners, and students committed to advancing racial, gender, and ethnic equity in the sphere of business.

→ WHARTON CEO DISTINGUISHED FACULTY IN RESIDENCE

Preeminent faculty from around the world will be selected to spend an academic year on campus to become part of the Wharton CEO community conducting scholarly research focused on race, gender, and ethnic issues. The deep ties that are built during their year at Wharton lays the foundation for a lasting relationship with Wharton CEO where their work will continue to inform and enrich the community.

→ WHARTON CEO STUDENT FELLOWS

Wharton CEO provides unique opportunities to enrich students' educational experiences. Undergraduate, MBA, and PhD students will lead project-based activities that advance equity and opportunity knowledge. This community of students represent Wharton and Penn's most committed to addressing the issues of equity across many dimensions.

→ WHARTON CEO PREDOCTORAL AND POSTDOCTORAL FELLOWS

Wharton CEO relies on the innovation, passion, and perseverance of emerging researchers committed to discovering new insights around equity and opportunity. Both fellows programs provide the opportunity for talented candidates to work side-by-side with the world's most preeminent faculty members, positioning themselves for long-term success.

Through annual calls for research, Wharton CEO will fund projects that advance equity and opportunity across a variety of topics.

INAUGURAL WHARTON CEO FACULTY FELLOW: STEPHANIE J. CREARY, PHD

The Wharton CEO Faculty Fellow is a two-year appointment to a standing faculty member conducting relevant research. The Fellow serves as an advisor to Wharton CEO.

Stephanie Creary is Assistant Professor of Management at Wharton. Professor Creary's research is focused on understanding how to create more inclusive workplaces and organizations. She has studied these dynamics in a variety of organizational contexts, including global companies, corporate board rooms, hospitals, yoga communities, and the United States Army. She is affiliated with several Institutes and Centers at Wharton and the University: Wharton People Analytics, Leonard Davis Institute for Health Economics, Penn Center for Africana Studies, the Gender, Sexuality, and Women's Studies Program, and the Center for Research in Feminist, Queer, and Transgender Studies.



RESEARCH HIGHLIGHT: OUT OF THE BOX? HOW MANAGING A SUBORDINATE'S MULTIPLE IDENTITIES AFFECTS THE QUALITY OF A MANAGER-SUBORDINATE RELATIONSHIP

WHARTON OPPORTUNITIES FOR REENTRY, KNOWLEDGE, AND SKILLS PROGRAM (WORKS)

EXPANDING THE IMPACT OF NEXT GENERATION BUSINESS LEADERS IN ADDRESSING MASS INCARCERATION INEQUITIES

An early-stage initiative led by Professor Damon Phillips, WORKS immerses Wharton MBA students into a collaborative learning environment and empowers them to directly improve employment outcomes for incarcerated persons. The program has a dual impact: First, incarcerated individuals gain the skills needed to forge a path of professional and personal success as they reintegrate into the workforce and society. Second, MBA students gain insight into the issues affecting incarcerated populations.

INTEREST ON CAMPUS HAS SURPASSED EXPECTATIONS

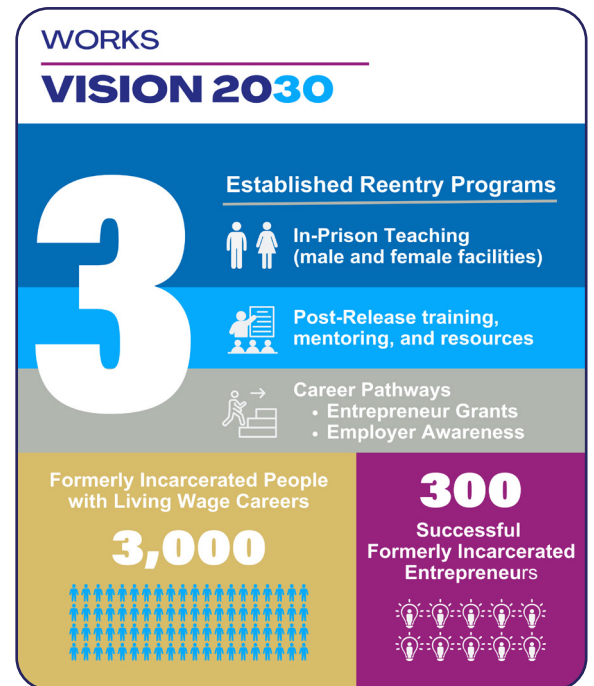
The inaugural WORKS cohort engaged 16 MBA students through credit-bearing courses that centered on teaching business skills to 24 incarcerated men on-site at a medium-security prison. As word about the courses spread, student interest has surged. In its second semester, the program has enrolled more than 70 MBA students and is exploring ways to involve interested undergraduate students.

FAR-REACHING IMPACT

WORKS is a life-changing opportunity for both Wharton students and individuals affected by the justice system. Returning citizens receive actionable skills and knowledge that can lead to prosperous career paths. Students expand their capacity for compassionate leadership that will carry over into their professional journey.

“Formerly incarcerated people often face discrimination when trying to reenter the workforce. This is compounded by other significant barriers. For instance, they may lack the skills to qualify for well-paying jobs; companies often do not proactively seek to hire from this group; and incarcerated individuals are usually prevented from staying abreast of rapidly changing technology. These are key reasons why, although over 600,000 people return from prison each year, two-thirds of them will recidivate within three years.”

DAMON J. PHILLIPS
*Robert Steinberg Professor
Professor of Management*



PARTNERS ACROSS PENN ADVANCE CEO'S MISSION

Wharton CEO partners with academic programs and research centers across the School and University to advance racial and broad-based equity in society through several programs. Many of these programs expand Wharton's reach beyond the traditional learners enrolled in degree and certificate programs. Programs focus on addressing the following issues:

- ⊖ **Financial Literacy and the Wealth Gap**
- ⊖ **Entrepreneurship**
- ⊖ **Health Care Equity**
- ⊖ **Sports and Entertainment**

"Historically, the equity and opportunity issues of a given day were captured by labels such as abolition, reconstruction, suffrage, equal employment opportunity and even, simply, diversity. Wharton's framing of Equity and Opportunity is positioned to be that sustained effort and nomenclature agile enough to deal with whatever business and society encounters in this context today and moving forward."

KENNETH L. SHROPSHIRE
Wharton CEO Faculty Director

INCREASING ACCESS TO AN IVY-LEAGUE COLLEGE EXPERIENCE

Wharton Global Youth's On-Campus Summer Programs are exceptional immersive learning experiences for outstanding high school students. The rigorous curriculum allows students to examine emergent topics of business and industry led by the research and teaching of Wharton's foremost faculty.

Wharton Global Youth provides scholarships to local, high-achieving students to participate in the two-week program. Students stay on Penn's campus, dine together, attend weekend activities, and study peer-to-peer. Participants gain the confidence needed to pursue an ivy-league education and explore career pathways.



PARTNERS ACROSS PENN ADVANCE CEO'S MISSION

ADVANCING OPPORTUNITIES TO EXPLORE ENTREPRENEURSHIP

Created by Venture Lab, the Bet on Entrepreneurship (BoE) program opens access to the world of entrepreneurship and investing to first-generation and low-income Penn undergraduates. Through summer immersive experiences with Silicon Valley firms, students gain insight into various roles at early-stage companies by hands-on, project-based experiential learning. Selected students are set up for success by professional development training and cocurricular coursework that teaches fundamental business concepts prior to placement. These funded opportunities allow learners to explore career paths in venture capital where they can envision themselves as analysts, associates, or founders and gain required skills to advance into their preferred roles.



Photo credit: Hoag Levins

ADVANCING HEALTH CARE EQUITY

First generation and underrepresented students face significant social, cultural, and financial barriers to pursuing careers in the medical field. Yet their participation in medicine is critically important. Underrepresented researchers are more likely to focus on crucial but often overlooked problems pertaining to the nation's health. They also understand the structural disparities that exist in health care and can provide better patient care outcomes as a result.

WHARTON SUMMER UNDERGRADUATE MENTORED RESEARCH (SUMR)

SUMR is a collaboration between the Leonard Davis Institute of Health Economics and the Health Care Management Department of Wharton. The 12-week summer internship program introduces students to the field of research and helps them explore career paths.

PHILANTHROPIC OPPORTUNITIES

ADVANCE EQUITY AND INCLUSION WITH IMPACTFUL SUPPORT

A term or endowed gift provides sustaining support for the Coalition. You can broadly support the Wharton CEO Fund or designate funding for one or more of the following areas:

- ➔ **WHARTON OPPORTUNITIES FOR REENTRY, KNOWLEDGE, AND SKILLS (WORKS)**
Expand opportunities for more students to participate in the innovative curricular program and help Wharton drive positive employment outcomes for those affected by the justice system.
- ➔ **BUSINESS TOOLS AND RESOURCE DEVELOPMENT**
Enable Wharton CEO to produce and disseminate evidence-based techniques for organizations to implement for maximum impact.
- ➔ **FACULTY FELLOWS/VISITING PROFESSORS**
Provide financial support for faculty members (standing, associated, or affiliated) who will engage in academic research and programming around issues of equity and opportunity.
- ➔ **STUDENT FELLOWS**
Help the School develop and advance leadership and research opportunities for Wharton MBA and undergraduate students.
- ➔ **GLOBAL YOUTH ON-CAMPUS SCHOLARSHIPS**
Funding enables Wharton to increase access to its summer programs for select Title I high school students.

CORPORATE AND FOUNDATION ENGAGEMENT OPPORTUNITY

Wharton invites its most trusted partner organizations to advance this monumental initiative by joining the Wharton Coalition for Equity and Opportunity. A minimum philanthropic commitment of \$150,000 paid over three years will enable Wharton CEO to facilitate collaboration and convenings between academics and practitioners. At this level, organizations will receive:

- An invitation to join annual meetings of coalition members to gain insights from research produced by CEO and discuss themes that will inform Wharton’s research agenda.
- Wharton CEO’s annual report, featuring a compiled summary of recommendations that corporate boards can consider when shaping policy and making business decisions to better serve employees.
- Recognition on the Wharton CEO website as a “founding member” of the Coalition.

PHILANTHROPIC OPPORTUNITIES

ADVANCE EQUITY AND INCLUSION WITH A NAMING GIFT

Endowing a specific program or position within Wharton CEO provides a stable source of income, ensuring generations of leaders benefit from the important outcomes generated by the Coalition. Areas that would benefit from this level of philanthropy include:

⇒ WHARTON CEO LAB

Endowing the lab provides the financial means to ensure scholars at all career levels have access and ability to participate in Wharton's world-class research environment to conduct innovative, timely work for generations to come.

⇒ INDUSTRY VERTICALS

A leadership gift will endow funding to support activities and events in one of the four initial areas of focus: advancing health equity; generating inclusive and equitable wealth; creating equity in entrepreneurship and the labor market; and raising equity and opportunity in sports and entertainment.

⇒ PREDOCTORAL OR POSTDOCTORAL FELLOWS

Fellows programs enable students and recent PhD graduates to position themselves for long-term careers in academia and thought leadership. They support faculty in producing rigorous and practically relevant research.

⇒ EXECUTIVES-IN-RESIDENCE

Visionaries in their fields, Executives-in-Residence share real-world applications of theory and practical leadership experiences, bringing new perspectives to the classroom.

⇒ FACULTY DIRECTOR OR MANAGING DIRECTOR

These two prominent roles provide the strategic vision for Wharton CEO. Each position plays an active role in managing the resources for research, recruiting new faculty, helping advance curricular and cocurricular activities and represents Wharton at national and global events.

GIFT OPTIONS: ENDOWED OR TERM

An **endowed gift** provides sustained funding that transforms a program or initiative. This form of philanthropy enables Wharton to confidently launch new initiatives and plan for future activities or address immediate needs. **Term funding** provides greater financial support upfront than an endowed gift. Term funding is spent down over a period of years.

PHILANTHROPIC COMMITMENTS ARE TYPICALLY PAID OVER A PERIOD OF THREE TO FIVE YEARS.

WHARTON CEO LEADERSHIP



KENNETH L. SHROPSHIRE

Faculty Director and Senior Advisor to the Dean

Ken Shropshire is a distinguished professor, attorney, and author with a longstanding career focused on equity and ethics. For more than 30 years, Professor Shropshire harnessed research interests in sports and business law, social impact, antitrust, contracts and negotiations, and the sports industry to found and lead the Wharton Sports Business Initiative. Professor Shropshire has served as a board director of a leading financial firm and consulted with major sports teams. He holds degrees from Columbia Law School and Stanford University.



FAREEDA GRIFFITH

Managing Director

Fareeda Griffith is a professor, researcher, and demographer with over a decade of experience in higher education teaching and administration. At Denison University, Professor Griffith served as director of Global Health — a multidisciplinary degree program — and as an associate professor within the Anthropology and Sociology department. Her doctoral work focused on housing segregation and race in South Africa. Professor Griffith holds degrees from the University of Pennsylvania and Paine College.



To learn more about supporting Wharton CEO,
please contact Wharton External Affairs:

+1.215.898.8479 or **external.affairs@wharton.upenn.edu**