



STATE OF THE CLUBS

JUNE 2018

FORWARD

Dear Club Leaders,

I am thrilled to be able to share the results of our revamped Annual Global Clubs Survey with you. In the past, the survey served primarily as a check-in point with club presidents to collect basic information on club structures and activities. This information provided us with a surface level snapshot of how active and healthy the Global Clubs Network was. This year we aimed to take the survey questions a step further and dive deeper into the most common challenges we hear from club leaders. The redesigned survey has produced valuable benchmarking data that clubs can use to learn from one another and set more informed goals for the upcoming year.

I want to thank the 62 clubs who took the time to complete the survey. Your commitment to helping your fellow volunteers make more strategic, data driven decisions directly contributes to the overall success of the Global Clubs Network. Along with the entire Global Clubs team, I look forward to working with you to utilize this benchmarking data to take your club to new heights in 2018 and beyond!

Sincerely,



Kelly Lauersen
Senior Associate Director, Global Clubs

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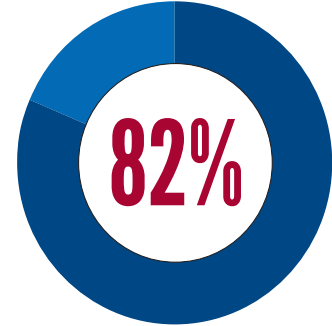
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DATA COLLECTION

ANNUAL SURVEY RESPONSES

This year the Global Clubs team redesigned the annual club survey to target common challenges and benchmarking statistics.

62 clubs participated in the survey, yielding a record high response rate of 82%.



ALUMNI POPULATION DATA

Aggregate data collected by the University is also shared in this summary to show population totals.

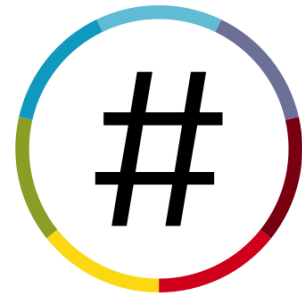
Rather than benchmarking by region, this summary will frame data by the number of alumni each club serves. This is to show how resources might be divided per person and what target engagement metrics - like membership - clubs should aim for.



NATIONBUILDER REPORTING

Enhanced reporting tools from the School's club website platform, NationBuilder, provided insights into membership trends and alumni engagement in programs.

As reporting tools expand, NationBuilder platform users will have this data at their fingertips year-round.

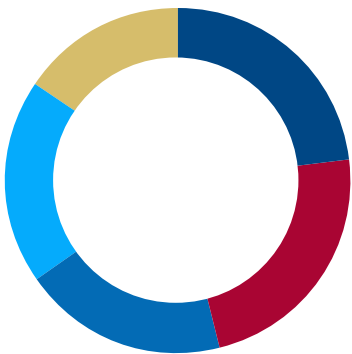


NETWORK AT A GLANCE

75 CLUBS

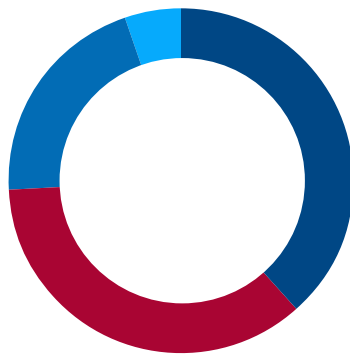


26 DOMESTIC



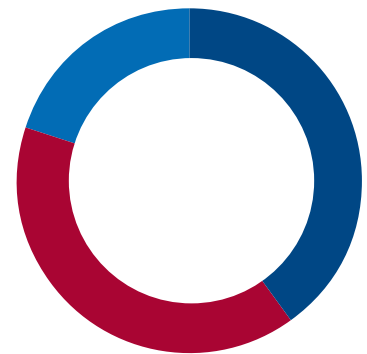
Midwest	6
Southwest	6
Northeast	5
Southeast	5
Northwest	4

39 INTERNATIONAL



Asia	15
EMEA	14
Latin America	8
Canada	2

10 AFFINITY



Industry	4
Interest	4
Program	2

POPULATION TIERS

	Type	Region	Club	Total Alumni Served by Region or Affinity
5,000 +	US	NE	Wharton Club of New York	22,149
	US	NE	Wharton Club of Philadelphia	15,571
	US	NE	Wharton Club of New Jersey	8,402
	US	NW	Wharton Club of Northern California	6,919
1,500 - 5,000	US	NE	Washington, DC (no officially recognized club)	4,310
	US	SW	Wharton Club of Southern California	3,993
	US	NE	Wharton Club of Boston	3,906
	US	MW	Wharton Club of Chicago	2,111
	INTL	EMEA	Wharton Club of the UK	2,032
	US	SE	Wharton Club of South Florida	1,513
1,000 - 1,500	US	SE	Wharton Club of Atlanta	1,498
	US	NW	Wharton Club of Seattle	1,332
	US	SW	Penn & Wharton Club of Arizona*	1,205
	INTL	Asia	Penn & Wharton Club of Singapore*	1,183
	INTL	Asia	Wharton Club of Japan	1,100
	US	NW	Wharton Club of Colorado	1,087
	INTL	Asia	Wharton Club of Hong Kong	1,053
	US	SW	Wharton Club of Dallas-Fort Worth	1,039
	US	SW	Wharton Club of Houston	1,021
500 - 1,000	INTL	Canada	Penn & Wharton Club of Toronto*	856
	US	MW	Penn & Wharton Club of Michigan*	773
	INTL	EMEA	Wharton Club of the Middle East	722
	US	SW	Wharton Club of San Diego	693
	US	SE	Penn & Wharton Club of Central Florida*	690
	US	SW	Penn & Wharton Club of Austin*	663
	INTL	Asia	Wharton Club of Korea	642
	US	MW	Wharton Club of Minnesota	551
	INTL	LatAm	Wharton Club of Brazil	516
	US	MW	Wharton Club of Northeast Ohio	503
	300 - 500	US	MW	Wharton Club of Western Pennsylvania
INTL		Asia	Penn & Wharton Club of the Philippines*	478
INTL		Asia	Wharton Club of Australia/New Zealand	471
INTL		EMEA	Wharton Club of Switzerland	413
US		SE	Wharton Club of Greater Tampa Bay	390
INTL		Asia	Wharton Club of India (Mumbai)	366
INTL		LatAm	Penn & Wharton Club of Mexico City*	363
US		SE	Wharton Club of Charlotte	357
INTL		EMEA	Wharton Club of Germany/Austria	354
INTL		Asia	Wharton Club of Shanghai	343

POPULATION TIERS CONT'D

	Type	Region	Club	Total Alumni Served by Region or Affinity
300 - 500 CONT'D	INTL	EMEA	Wharton Club of Spain	340
	US	NW	Wharton Club of Portland	328
	INTL	LatAm	Penn & Wharton Club of Argentina*	317
	INTL	Asia	Wharton Club of Beijing	309

100 - 300	INTL	Asia	Penn & Wharton Club of Malaysia	297
	US	MW	Wharton Club of St. Louis	286
	INTL	Asia	Wharton Club of Thailand	283
	INTL	EMEA	Penn & Wharton Club of Turkey	283
	INTL	EMEA	Penn & Wharton Club of the Netherlands*	276
	INTL	EMEA	Wharton Club of Paris	272
	US	NE	Wharton Club of Rhode Island	267
	INTL	EMEA	Wharton Club of Italy	258
	INTL	Asia	Wharton Club of Taiwan	249
	INTL	Asia	Wharton Club of Delhi	239
	INTL	EMEA	Wharton Club of Israel	207
	INTL	EMEA	Wharton Club of Belgium	194
	INTL	Asia	Penn & Wharton Club of Indonesia*	188
	INTL	LatAm	Penn & Wharton Club of Colombia*	183
	INTL	LatAm	Wharton Club of Chile	113
	INTL	LatAm	Wharton Club of Peru	112
	INTL	Canada	Wharton Club of Quebec	108
	INTL	EMEA	Wharton Club of South Africa	107
INTL	EMEA	Wharton Club of Russia	106	

< 100	INTL	LatAm	Wharton Club of Monterrey	88
	INTL	EMEA	Wharton Club of Greece	67
	INTL	Asia	Penn & Wharton Club of Vietnam*	67
	INTL	LatAm	Penn & Wharton Club of the DR*	65

Affinity Groups	affinity	Program	Pi Delta Epsilon**	6,949
	affinity	Industry	Wharton Healthcare Management Alumni Association***	4,967
	affinity	Interest	Wharton Follies****	2,490
	affinity	Industry	Wharton Private Equity & Venture Capital Alumni Association***	2,396
	affinity	Industry	Wharton Energy Network***	868
	affinity	Interest	Wharton Out for Business****	400
	affinity	Program	JD/MBA Alumni Association**	365
	affinity	Interest	Wharton Alumni Social Impact Affinity Group****	331
	affinity	Industry	Wharton Aerospace Community**	317
	affinity	Interest	Wharton Black MBA Alumni Association****	168

* Penn & Wharton joint club population totals include all Penn alumni per region.

** Program-based affinity groups include all alumni that have completed their respective degree programs.

*** Industry-based affinity groups include all alumni tagged with an employer industry marker by the University.

**** Interest-based affinity groups serve alumni on an opt-in basis. For clubs without an opt-in process connected to University records, corresponding student-group participation tags are used to generate an estimated alumni reach number.

CLUB CLASSIFICATION

REGIONAL AND AFFINITY

Members of the Wharton Global Clubs Network may operate as regional groups or affinity communities. Regional groups serve alumni based on their preferred address at the city, state, region, or country level. Affinity groups operate across multiple regions and provide programming for alumni based on industry, special interest, or program affiliation.

As Wharton evolves and grows, so too does the Global Clubs Network. Affinity groups allow Wharton to be agile and offer targeted programming in line with new focuses for alumni. In 2018, the [Wharton Alumni Social Impact Affinity Club](#) was officially recognized as the newest member of the Network, mirroring the School's priorities and the growth of the Wharton Social Impact Initiative.

Regional clubs have also had tremendous success by developing special interest groups at the local level. Learn more about [Special Interest Groups](#) on page 20.

DOMESTIC AND INTERNATIONAL

Regional clubs have a combined Wharton alumni reach of over 94,000, which enables Wharton to bring alumni programming to over 98% of alumni where they live and work. Of the 65 regional alumni clubs, 39 are based internationally. *See page 2 for a full breakdown of regional clubs.*

The strength and reach of the Wharton Global Clubs Network is a testament to the global priorities of the Wharton School. In 2017, Wharton's incoming Class of 2019 was represented by over one third international students representing 65 countries. The Global Clubs Network adds tremendous value to the Wharton brand around the world by acting as local ambassadors for the School

CLUB CLASSIFICATION CONT'D

PENN & WHARTON JOINT CLUBS

Penn and Wharton currently recognize 16 joint clubs that serve the total Penn alumni population in their regions, with a special emphasis on Wharton programming. These clubs are predominantly international, where there tend to be smaller alumni populations that skew at least 50% for Wharton degree programs. Joint clubs are established on a case-by-case basis and must meet minimum standards set by both Penn and Wharton.

16

PENN & WHARTON
JOINT CLUBS

ARGENTINA
ARIZONA
AUSTIN
CENTRAL FLORIDA
COLOMBIA
THE DOMINICAN REPUBLIC
INDONESIA
MALAYSIA
MEXICO CITY
MICHIGAN
THE NETHERLANDS
SINGAPORE
TORONTO
TURKEY
THE PHILIPPINES
VIETNAM

LEADERSHIP TEAMS



MINIMUM STANDARD

Wharton Clubs must have a minimum of two officers or board members, including separate people fulfilling the roles of President and Treasurer. The President must be a degreed alumnus of Wharton and, for regional clubs, must reside primarily in the club's jurisdiction.



NETWORK AVERAGE

The network-wide average leadership team size is ten. Contact your staff liaison to learn more about developing a right-sized leadership team to effectively manage club business and programming.

21%

SEPARATE OFFICER & ADVISORY BOARDS

For 21% of clubs, maintaining both an officer team and an advisory board is an effective way to continue engaging volunteers at every stage. Officer positions like President, Treasurer, and VP of Programming can be taken on by new volunteers, while advisory board roles are often filled by past leadership or more senior, high profile alumni. This is a great strategy to maintain a club's momentum long-term and preserve institutional knowledge.

13%

POSITIONS TO LEAD SPECIAL PROGRAMS

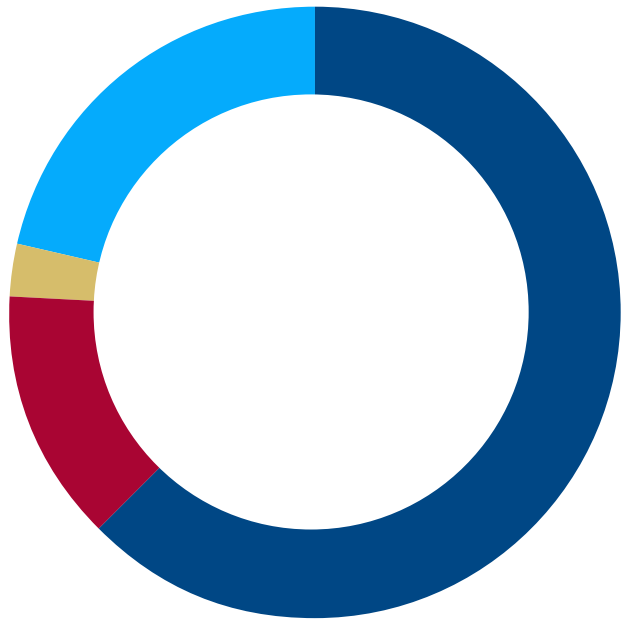
Likewise, creating positions for specialized programming can help volunteers pursue strategic priorities for the club. Contact your staff liaison to discuss developing special initiatives like young alumni engagement, entrepreneurship, or alumnae programming. A full list of [special interest groups](#) by club is also available on page 20.

CLUB WEBSITES

VALUE OF WEB PRESENCE

All officially recognized clubs are encouraged to maintain a web presence. Wharton Alumni Relations offers a website domain and platform called [NationBuilder](#) to officially recognized clubs. To learn more about getting started, contact your staff liaison!

With over 85% of clubs on a website platform, the strength and reach of the Global Clubs Network is made more accessible not only to alumni, but the entire Wharton community worldwide.



NationBuilder	47
Independent Platform	10
iModules (Penn)	2
No Website	16

WEBSITE PLATFORM OPTIONS

The NationBuilder platform was introduced to clubs in 2016 to provide more robust community organizing, data reporting, and event management tools to club leaders.

Joint Penn & Wharton clubs may opt to use the [iModules](#) website platform offered by Penn Alumni Relations. Contact your staff liaison for more details.

CLUB WEBSITES CONT'D

	Type	Region	Club	Website Platform
5,000 +	US	NE	Wharton Club of New York	Independent platform
	US	NE	Wharton Club of Philadelphia	NationBuilder
	US	NE	Wharton Club of New Jersey	NationBuilder
	US	NW	Wharton Club of Northern California	Independent platform

1,500 - 5,000	US	NE	Washington, DC (no officially recognized club)	
	US	SW	Wharton Club of Southern California	Independent platform
	US	NE	Wharton Club of Boston	NationBuilder
	US	MW	Wharton Club of Chicago	NationBuilder
	INTL	EMEA	Wharton Club of the UK	NationBuilder
	US	SE	Wharton Club of South Florida	NationBuilder

1,000 - 1,500	US	SE	Wharton Club of Atlanta	NationBuilder
	US	NW	Wharton Club of Seattle	NationBuilder
	US	SW	Penn & Wharton Club of Arizona	NationBuilder
	INTL	Asia	Penn & Wharton Club of Singapore	NationBuilder
	INTL	Asia	Wharton Club of Japan	NationBuilder
	US	NW	Wharton Club of Colorado	NationBuilder
	INTL	Asia	Wharton Club of Hong Kong	NationBuilder
	US	SW	Wharton Club of Dallas-Fort Worth	NationBuilder
US	SW	Wharton Club of Houston	NationBuilder	

500 - 1,000	INTL	Canada	Penn & Wharton Club of Toronto	NationBuilder
	US	MW	Penn & Wharton Club of Michigan	NationBuilder
	INTL	EMEA	Wharton Club of the Middle East	NationBuilder
	US	SW	Wharton Club of San Diego	Independent platform
	US	SE	Penn & Wharton Club of Central Florida	iModules (Penn)
	US	SW	Penn & Wharton Club of Austin	NationBuilder
	INTL	Asia	Wharton Club of Korea	NationBuilder
	US	MW	Wharton Club of Minnesota	NationBuilder
	INTL	LatAm	Wharton Club of Brazil	NationBuilder
	US	MW	Wharton Club of Northeast Ohio	NationBuilder

300 - 500	US	MW	Wharton Club of Western Pennsylvania	NationBuilder
	INTL	Asia	Penn & Wharton Club of the Philippines	Independent platform
	INTL	Asia	Wharton Club of Australia/New Zealand	NationBuilder
	INTL	EMEA	Wharton Club of Switzerland	NationBuilder
	US	SE	Wharton Club of Greater Tampa Bay	NationBuilder
	INTL	Asia	Wharton Club of India (Mumbai)	NationBuilder
	INTL	LatAm	Penn & Wharton Club of Mexico City	iModules (Penn)
	US	SE	Wharton Club of Charlotte	NationBuilder
	INTL	EMEA	Wharton Club of Germany/Austria	NationBuilder
	INTL	Asia	Wharton Club of Shanghai	Independent platform

CLUB WEBSITES CONT'D

	Type	Region	Club	Website Platform
300 - 500 CONT'D	INTL	EMEA	Wharton Club of Spain	NationBuilder
	US	NW	Wharton Club of Portland	NationBuilder
	INTL	LatAm	Penn & Wharton Club of Argentina	NationBuilder
	INTL	Asia	Wharton Club of Beijing	No website

100 - 300	INTL	Asia	Penn & Wharton Club of Malaysia	NationBuilder
	US	MW	Wharton Club of St. Louis	Independent platform
	INTL	Asia	Wharton Club of Thailand	No website
	INTL	EMEA	Penn & Wharton Club of Turkey	NationBuilder
	INTL	EMEA	Penn & Wharton Club of the Netherlands	No website
	INTL	EMEA	Wharton Club of Paris	NationBuilder
	US	NE	Wharton Club of Rhode Island	Independent platform
	INTL	EMEA	Wharton Club of Italy	Independent platform
	INTL	Asia	Wharton Club of Taiwan	NationBuilder
	INTL	Asia	Wharton Club of Delhi	No website
	INTL	EMEA	Wharton Club of Israel	No website
	INTL	EMEA	Wharton Club of Belgium	No website
	INTL	Asia	Penn & Wharton Club of Indonesia	No website
	INTL	LatAm	Penn & Wharton Club of Colombia	No website
	INTL	LatAm	Wharton Club of Chile	NationBuilder
	INTL	LatAm	Wharton Club of Peru	No website
	INTL	Canada	Wharton Club of Quebec	No website
INTL	EMEA	Wharton Club of South Africa	No website	
INTL	EMEA	Wharton Club of Russia	NationBuilder	

< 100	INTL	LatAm	Wharton Club of Monterrey	No website
	INTL	EMEA	Wharton Club of Greece	NationBuilder
	INTL	Asia	Penn & Wharton Club of Vietnam	No website
	INTL	LatAm	Penn & Wharton Club of the DR	No website

Affinity Groups	affinity	Program	Pi Delta Epsilon	NationBuilder
	affinity	Industry	Wharton Healthcare Management Alumni Association	NationBuilder
	affinity	Interest	Wharton Follies	NationBuilder
	affinity	Industry	Wharton Private Equity & Venture Capital Alumni Association	Independent platform
	affinity	Industry	Wharton Energy Network	NationBuilder
	affinity	Interest	Wharton Out for Business	NationBuilder
	affinity	Program	JD/MBA Alumni Association	NationBuilder
	affinity	Interest	Wharton Alumni Social Impact Affinity Group	NationBuilder
	affinity	Industry	Wharton Aerospace Community	No website
	affinity	Interest	Wharton Black MBA Alumni Association	No website

MEMBERSHIP

41%

OF CLUBS OFFER
PAID MEMBERSHIP

133

NETWORK-WIDE AVERAGE
PAID MEMBERSHIPS

12%

NETWORK-WIDE AVERAGE
MEMBERSHIP PENETRATION

BEST PRACTICES FOR MEMBERSHIP



MEMBERS ONLY
EVENTS & PERKS



DISCOUNTS FOR
RECENT GRADUATES



ANNUAL DRIVE
FOR MEMBERS

MEMBERSHIP CONT'D



86

4%

126

16%

U.S. AVERAGE
MEMBERSHIPS

U.S. AVERAGE
PENETRATION

INT'L AVERAGE
MEMBERSHIPS

INT'L AVERAGE
PENETRATION

ABOVE AVERAGE MEMBERSHIP PENETRATION

DOMESTIC

INTERNATIONAL

Wharton Club of Charlotte	11%	Wharton Club of Spain	32%
Wharton Club of Dallas-Fort Worth	9%	Penn & Wharton Club of the Philippines	31%
Wharton Club of Houston	9%	Wharton Club of Paris	23%
Wharton Club of Chicago	8%	Wharton Club of Delhi	17%
Wharton Club of Northern California	6%		
Wharton Club of South Florida	6%		

MEMBERSHIP CONT'D

	Type	Region	Club	# of Alumni in Club Region or Affinity	Membership Structure	# of Paid Members	Paid Membership Penetration %	Avg Paid Members
5,000 +	US	NE	Wharton Club of New York	22,149	Paid & Unpaid	500	2%	315
	US	NE	Wharton Club of Philadelphia	15,571	Paid	191	1%	
	US	NE	Wharton Club of New Jersey	8,402	Paid	170	2%	
	US	NW	Wharton Club of Northern California	6,919	Paid	400	6%	
1,500 - 5,000	US	NE	Washington, DC (no officially recognized club)	4,310				150
	US	SW	Wharton Club of Southern California	3,993	Paid			
	US	NE	Wharton Club of Boston	3,906	Paid	171	4%	
	US	MW	Wharton Club of Chicago	2,111	Paid	166	8%	
	INTL	EMEA	Wharton Club of the UK	2,032	Paid	175	9%	
	US	SE	Wharton Club of South Florida	1,513	Paid	89	6%	
1,000 - 1,500	US	SE	Wharton Club of Atlanta	1,498	Paid	32	2%	61
	US	NW	Wharton Club of Seattle	1,332	Paid	12	1%	
	US	SW	Penn & Wharton Club of Arizona	1,205	Paid	42	3%	
	INTL	Asia	Penn and Wharton Club of Singapore	1,183	None			
	INTL	Asia	Wharton Club of Japan	1,100	Paid	138	13%	
	US	NW	Wharton Club of Colorado	1,087	Paid	20	2%	
	INTL	Asia	Wharton Club of Hong Kong	1,053	None			
	US	SW	Wharton Club of Dallas-Fort Worth	1,039	Paid	93	9%	
	US	SW	Wharton Club of Houston	1,021	Paid	87	9%	
500 - 1,000	INTL	Canada	Penn & Wharton Club of Toronto	856	Paid	31	4%	34
	US	MW	Penn & Wharton Club of Michigan	773	Paid	5	1%	
	INTL	EMEA	Wharton Club of the Middle East	722	Unpaid			
	US	SW	Wharton Club of San Diego	693	Unpaid			
	US	SE	Penn & Wharton Club of Central Florida	690	None			
	US	SW	Penn & Wharton Club of Austin	663	None			
	INTL	Asia	Wharton Club of Korea	642	Paid & Unpaid	65	10%	
	US	MW	Wharton Club of Minnesota	551	Paid & Unpaid			
	INTL	LatAm	Wharton Club of Brazil	516	Unpaid			
	US	MW	Wharton Club of Northeast Ohio	503	None			
300 - 500	US	MW	Wharton Club of Western Pennsylvania	496	Paid	2	<1%	61
	INTL	Asia	Penn and Wharton Club of the Philippines	478	Paid	150	31%	
	INTL	Asia	Wharton Club of Australia/New Zealand	471	Unpaid			
	INTL	EMEA	Wharton Club of Switzerland	413	Paid	6	1%	
	US	SE	Wharton Club of Greater Tampa Bay	390	None			
	INTL	Asia	Wharton Club of India (Mumbai)	366	Unpaid			
	INTL	LatAm	Penn & Wharton Club of Mexico City	363	Unpaid			
	US	SE	Wharton Club of Charlotte	357	Paid	39	11%	
	INTL	EMEA	Wharton Club of Germany/Austria	354	Unpaid			
	INTL	Asia	Wharton Club of Shanghai	343	Paid & Unpaid			

MEMBERSHIP CONT'D

	Type	Region	Club	# of Alumni in Club Region or Affinity	Membership Structure	# of Paid Members	Paid Membership Penetration %	Avg Paid Members
300-500 CONT'D	INTL	EMEA	Wharton Club of Spain	340	Paid & Unpaid	110	32%	61
	US	NW	Wharton Club of Portland	328	Unpaid			
	INTL	LatAm	Penn & Wharton Club of Argentina	317	None			
	INTL	Asia	Wharton Club of Beijing	309	None			
100 - 300	INTL	Asia	Penn & Wharton Club of Malaysia	297	None			51
	US	MW	Wharton Club of St. Louis	286	None			
	INTL	Asia	Wharton Club of Thailand	283	None			
	INTL	EMEA	Penn & Wharton Club of Turkey	283	Unpaid			
	INTL	EMEA	Penn & Wharton Club of the Netherlands	276	None			
	INTL	EMEA	Wharton Club of Paris	272	Paid	62	23%	
	US	NE	Wharton Club of Rhode Island	267	None			
	INTL	EMEA	Wharton Club of Italy	258	None			
	INTL	Asia	Wharton Club of Taiwan	249	Unpaid			
	INTL	Asia	Wharton Club of Delhi	239	Paid & Unpaid	40	17%	
	INTL	EMEA	Wharton Club of Israel	207	Unpaid			
	INTL	EMEA	Wharton Club of Belgium	194				
	INTL	Asia	Penn & Wharton Club of Indonesia	188				
	INTL	LatAm	Penn & Wharton Club of Colombia	183	None			
	INTL	LatAm	Wharton Club of Chile	113	None			
	INTL	LatAm	Wharton Club of Peru	112	None			
	INTL	Canada	Wharton Club of Quebec	108	Unpaid			
INTL	EMEA	Wharton Club of South Africa	107					
INTL	EMEA	Wharton Club of Russia	106	Unpaid				
< 100	INTL	LatAm	Wharton Club of Monterrey	88	None			0
	INTL	EMEA	Wharton Club of Greece	67	Unpaid			
	INTL	Asia	Penn & Wharton Club of Vietnam	67	Unpaid			
	INTL	LatAm	Penn & Wharton Club of the DR	65	Unpaid			
Affinity Groups	affinity	Program	Pi Delta Epsilon	6,949				432
	affinity	Industry	Wharton Healthcare Management Alumni Association	4,967	Paid	547	11%	
	affinity	Interest	Wharton Follies	2,490	None			
	affinity	Industry	Wharton Private Equity & Venture Capital Alumni Association	2,396	Paid	450	19%	
	affinity	Industry	Wharton Energy Network	868	Unpaid			
	affinity	Program	Wharton Out for Business	365	Unpaid			
	affinity	Interest	JD/MBA Alumni Association	331	Unpaid			
	affinity	Interest	Wharton Alumni Social Impact Affinity Group	400	Unpaid			
	affinity	Industry	Wharton Aerospace Community	317	Paid	300		
	affinity	Interest	Wharton Black MBA Alumni Association	168				

RISK MANAGEMENT

20%

OF RESPONDERS HAVE
INSURANCE

20%

OF RESPONDERS HAVE
LEGAL COUNSEL

10%

OF RESPONDERS HAVE
BOTH INSURANCE & LEGAL COUNSEL

BEST PRACTICES FOR RISK MANAGEMENT



DIRECTOR & OFFICER
INSURANCE THROUGH
LOCAL PROVIDER



PRO BONO LEGAL
CONSULTING FROM
PENN LAW ALUMNI

FINANCES

60%

OF CLUBS OPERATE
ABOVE BREAK-EVEN

PRIMARY SOURCES OF REVENUE



EVENT TICKET SALES
36% OF CLUBS



MEMBERSHIP DUES
12% OF CLUBS



SPONSORSHIP
8% OF CLUBS

ABOVE AVERAGE FISCAL RESPONSIBILITY

Wharton Club of Brazil

Wharton Club of Hong Kong

Penn & Wharton Club of the Philippines

Wharton Club of Chile

Wharton Club of Japan

Wharton Private Equity & Venture
Capital Alumni Association

Wharton Club of Dallas-Fort Worth

Penn & Wharton Club of Mexico City

Wharton Club of San Diego

Penn & Wharton Club of the DR

Wharton Club of New York

Penn & Wharton Club of Toronto

Wharton Healthcare Management
Alumni Association

Wharton Club of Paris

Wharton Club of the United Kingdom

*Fiscal responsibility score is measured and scaled by comparing bank account balance to total alumni population served.
Above average fiscal responsibility is determined by comparing individual averages to population tier averages.*

FINANCES CONT'D

	Type	Region	Club	Operating Budget	Bank Balance to Alumni Reach Ratio (Avg.)	Bank Account Balance (Avg.)
5,000 +	US	NE	Wharton Club of New York	\$100,000+	19	\$320,750
	US	NE	Wharton Club of Philadelphia	\$50,000-\$75,000		
	US	NE	Wharton Club of New Jersey	\$10,000-\$30,000		
	US	NW	Wharton Club of Northern California	\$10,000-\$30,000		
1,500 - 5,000	US	NE	Washington, DC (no officially recognized club)		17	\$36,953
	US	SW	Wharton Club of Southern California			
	US	NE	Wharton Club of Boston	\$10,000-\$30,000		
	US	MW	Wharton Club of Chicago	\$30,000-\$50,000		
	INTL	EMEA	Wharton Club of the UK	\$10,000-\$30,000		
	US	SE	Wharton Club of South Florida			
1,000 - 1,500	US	SE	Wharton Club of Atlanta	\$0-\$10,000	23	\$25,044
	US	NW	Wharton Club of Seattle	\$0-\$10,000		
	US	SW	Penn & Wharton Club of Arizona	\$0-\$10,000		
	INTL	Asia	Penn & Wharton Club of Singapore	\$0-\$10,000		
	INTL	Asia	Wharton Club of Japan	\$30,000-\$50,000		
	US	NW	Wharton Club of Colorado	\$0-\$10,000		
	INTL	Asia	Wharton Club of Hong Kong	\$10,000-\$30,000		
	US	SW	Wharton Club of Dallas-Fort Worth	\$10,000-\$30,000		
	US	SW	Wharton Club of Houston	\$30,000-\$50,000		
500 - 1,000	INTL	Canada	Penn & Wharton Club of Toronto	\$0-\$10,000	18	\$13,171
	US	MW	Penn & Wharton Club of Michigan			
	INTL	EMEA	Wharton Club of the Middle East	\$0-\$10,000		
	US	SW	Wharton Club of San Diego	\$0-\$10,000		
	US	SE	Penn & Wharton Club of Central Florida	\$0-\$10,000		
	US	SW	Penn & Wharton Club of Austin	\$0-\$10,000		
	INTL	Asia	Wharton Club of Korea	\$0-\$10,000		
	US	MW	Wharton Club of Minnesota	\$0-\$10,000		
	INTL	LatAm	Wharton Club of Brazil	\$50,000-\$75,000		
	US	MW	Wharton Club of Northeast Ohio			
300 - 500	US	MW	Wharton Club of Western Pennsylvania	\$0-\$10,000	24	\$11,427
	INTL	Asia	Penn & Wharton Club of the Philippines	\$10,000-\$30,000		
	INTL	Asia	Wharton Club of Australia/New Zealand	\$0-\$10,000		
	INTL	EMEA	Wharton Club of Switzerland	\$0-\$10,000		
	US	SE	Wharton Club of Greater Tampa Bay	\$0-\$10,000		
	INTL	Asia	Wharton Club of India (Mumbai)			
	INTL	LatAm	Penn & Wharton Club of Mexico City	\$30,000-\$50,000		
	US	SE	Wharton Club of Charlotte			
	INTL	EMEA	Wharton Club of Germany/Austria	\$0-\$10,000		
	INTL	Asia	Wharton Club of Shanghai	\$0-\$10,000		

Bank Balance to Alumni Reach Ratio is determined by dividing a club's total bank account balance by the number of alumni in the region or affinity it serves.

FINANCES CONT'D

	Type	Region	Club	Operating Budget	Bank Balance to Alumni Reach Ratio (Avg.)	Bank Account Balance (Avg.)
300 - 500 CONT'D	INTL	EMEA	Wharton Club of Spain	\$0-\$10,000	24	\$11,427
	US	NW	Wharton Club of Portland	\$0-\$10,000		
	INTL	LatAm	Penn & Wharton Club of Argentina	\$0-\$10,000		
	INTL	Asia	Wharton Club of Beijing	\$0-\$10,000		

100 - 300	INTL	Asia	Penn & Wharton Club of Malaysia	\$0-\$10,000	27	\$7,500
	US	MW	Wharton Club of St. Louis			
	INTL	Asia	Wharton Club of Thailand	\$0-\$10,000		
	INTL	EMEA	Penn & Wharton Club of Turkey	\$0-\$10,000		
	INTL	EMEA	Penn & Wharton Club of the Netherlands	\$0-\$10,000		
	INTL	EMEA	Wharton Club of Paris	\$10,000-\$30,000		
	US	NE	Wharton Club of Rhode Island	\$0-\$10,000		
	INTL	EMEA	Wharton Club of Italy	\$0-\$10,000		
	INTL	Asia	Wharton Club of Taiwan	\$10,000-\$30,000		
	INTL	Asia	Wharton Club of Delhi	\$0-\$10,000		
	INTL	EMEA	Wharton Club of Israel	\$0-\$10,000		
	INTL	EMEA	Wharton Club of Belgium	\$0-\$10,000		
	INTL	Asia	Penn & Wharton Club of Indonesia			
	INTL	LatAm	Penn & Wharton Club of Colombia			
	INTL	LatAm	Wharton Club of Chile	\$0-\$10,000		
	INTL	LatAm	Wharton Club of Peru	\$0-\$10,000		
	INTL	Canada	Wharton Club of Quebec	\$0-\$10,000		
INTL	EMEA	Wharton Club of South Africa				
INTL	EMEA	Wharton Club of Russia	\$0-\$10,000			

< 100	INTL	LatAm	Wharton Club of Monterrey	\$0-\$10,000	15	\$1,000
	INTL	EMEA	Wharton Club of Greece	\$0-\$10,000		
	INTL	Asia	Penn & Wharton Club of Vietnam	\$0-\$10,000		
	INTL	LatAm	Penn & Wharton Club of the DR	\$0-\$10,000		

Affinity Groups	affinity	Program	Pi Delta Epsilon	\$10,000-\$30,000	19	\$118,750
	affinity	Industry	Wharton Healthcare Management Alumni Association	\$75,000-\$100,000		
	affinity	Interest	Wharton Follies			
	affinity	Industry	Wharton Private Equity & Venture Capital Alumni Association	\$100,000+		
	affinity	Industry	Wharton Energy Network	\$0-\$10,000		
	affinity	Interest	Wharton Out for Business	\$0-\$10,000		
	affinity	Program	JD/MBA Alumni Association	\$0-\$10,000		
	affinity	Interest	Wharton Alumni Social Impact Affinity Group			
	affinity	Industry	Wharton Aerospace Community	\$50,000-\$70,000		
	affinity	Interest	Wharton Black MBA Alumni Association			

PROGRAMMING

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CLUB EVENTS WITH FACULTY MEMBERS



40% INCREASE
FROM 2016

ENGAGING HIGH PROFILE ALUMNI

Two years ago, a board of senior alumni formed to advise the club. By including senior alumni in club leadership, we create a positive cycle of engagement.



Paulo Ionescu, WG'10
Wharton Club of Brazil

We notify [senior alumni] of upcoming events, seek their input on what type of programming would be of greatest interest to members of the Club, and ask them to speak on occasion at Club events as a keynote speaker or panelist.



Todd Mortensen, L'12 WG'12
JD/MBA Alumni Association

We started an Alumni Live series which brings senior alumni to meet with younger alumni at industry group specific lunches or dinners. The groups are small, with no more than 15 attendees.



Sanjay Khanduri, WG'06
Wharton Club of Hong Kong

PROGRAMMING CONT'D

40%

OF CLUBS OPERATE
SPECIAL INTEREST GROUPS

15%

OF CLUBS MANAGE
MENTORSHIP PROGRAMS

Club	Business Leads	Alumnae	Angel Networks	Entrepreneur	Young Alumni	Mentorship
Wharton Club of New York	Leads	Alumnae		Entrepreneurs		
Wharton Club of Philadelphia	Leads	Alumnae				
Wharton Club of New Jersey	Leads	Alumnae				
Wharton Club of Northern California				Entrepreneurs		
Wharton Club of Southern California	Leads					
Wharton Club of Boston		Alumnae	Angels		Young Alumni	
Wharton Club of Chicago						Mentorship
Wharton Club of the UK			Angels			
Wharton Club of Seattle	Leads				Young Alumni	
Penn & Wharton Club of Arizona					Young Alumni	
Penn & Wharton Club of Singapore		Alumnae			Young Alumni	
Wharton Club of Japan		Alumnae				
Wharton Club of Colorado		Alumnae				
Wharton Club of Hong Kong		Alumnae				
Wharton Club of Dallas-Fort Worth		Alumnae			Young Alumni	
Wharton Club of the Middle East					Young Alumni	Mentorship
Wharton Club of San Diego			Angels		Young Alumni	
Wharton Club of Brazil		Alumnae	Angels			
Penn & Wharton Club of the Philippines					Young Alumni	
Wharton Club of Spain				Entrepreneurs		
Wharton Club of Delhi		Alumnae				
Wharton Club of Quebec		Alumnae				
Wharton Club of Monterrey					Young Alumni	
Penn & Wharton Club of the DR					Young Alumni	
Wharton Aerospace Community					Young Alumni	Mentorship
Wharton Energy Network					Young Alumni	
Wharton Healthcare Management					Young Alumni	Mentorship
Wharton Private Equity & Venture Capital Association		Alumnae				Mentorship
JD/MBA Alumni Association					Young Alumni	Mentorship

CLUB HIGHLIGHTS

A local Wharton alumna, Marsha Plotnitsky, C'78 WG'80, has generously allowed us to use her art gallery in Amsterdam as a club meeting space and we have organised a number of events on the back of gallery events, such as artist openings, readings and receptions.



John Terwilliger, C'83 W'83

Penn & Wharton Club of the Netherlands

Improving how we manage volunteers by introducing lean/kanban and by using LeanKit to manage projects. Creating a Google Drive for a central repository of documents for institutional memory and for volunteers to share and collaborate on documents simultaneously.



Regina Jaslow, W'97

Wharton Club of New York

Doubled our membership base, strengthened and stabilized the Board of Directors, and increased program offerings - including a mentorship program and career optimization program.



Cathryn Taylor, WG'87

Wharton Club of Chicago

For our annual joint General Members meeting/Thanksgiving party, we asked the U.S. Ambassador Sung Kim (a Penn alumnus) to host at his residence. Since protocol required every attendee's complete details, we used this opportunity to clean up our alumni database and build it up again with updated info.



Lindy Castillo, WG'98

Penn & Wharton Club of the Philippines

VOLUNTEER HONORS

Managing a Wharton alumni club requires teamwork and collaboration. The work of a club cannot be done by just one person. These volunteers have been highlighted by their presidents as models of excellence in club leadership.

Paulo Alberoni, WG'92

Bruce Aranoff, W'78

Kenny Beck, WG'87

Karen Burns, WG'86

Lisa Calloway, WG'07

David Cameron, G'08 L'08 WG'08

Nancy Casey, WG'95

Ellen Chang, C'88 WG'98

Paul Cheng, WG'61

Ben Craine, W'65

Carolyn Deng, WG'14

Beltrán Álvarez de Estrada, WG'96

Claire Fang, WG'14

Carl Fowler, WG'11

Tad Gray, WG'93

Alexandre Hamaide, WG'11

Lindsay Hunt, W'05

Juan Pereyra Iraola, WG'10

Roy Jutabha, W'83

Yuko Kawai, WG'93

Adam Khorshid, WG'09

Tipp Laosunthara, WG'06

Anne Lee, W'97

Helen Limcaoco, G'87 WG'97

Alberto Lisnier, G'00 WG'00

I-Cheng Liu, WG'97

Vidur Mahajan, WG'16

Matt McLaughlin, WG'17

Eduardo Musa, WG'96

Chris Nadherny, WG'79

Jane Oberwager, WG'03

Neal Piliavin, WG'80

Marsha Plotnitsky, C'78 WG'80

Laxman Rajagopalan, WG'06

Rich Scanlon, C'80 WG'86

Julie Scanlon

Parsa Sharbabaki, WG'16

Spencer Stern, WG'93

Kaned Suwattanachai, C'08 ENG'08 WG'16

Sanober Syed, WG'99

Andrew Tiffin, WG'16

Emmanuel Toutain, WG'04

Ed Wilson, WG'97

Eric J. Wright, WG'92