

## *Adlai Wertman*

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### PROFESSIONAL EXPERIENCE

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#### **University of Southern California, Marshall School of Business**

Los Angeles, CA

*David C. Bohnett Professor of Social Entrepreneurship*

2007 – present

- **Founding Director of the Brittingham Social Enterprise Lab** focused on the study, teaching and development of new models to bring business resources and education to global community needs.
- Spearheading the Marshall School's efforts in social entrepreneurship, including programming, curriculum, research and student projects.
- Created and serve as **Academic Director, Master of Science in Social Entrepreneurship** degree
- Developed and teach a curriculum to educate graduate and undergraduate students on social entrepreneurship and social responsibility.
- Created and serve as **Faculty Director, USC Warren Bennis Leadership Scholars program**
- Academic Advisory Board, Sidney Harman Institute for Polymathic Studies
- Faculty Fellow, Price School Center for Social Innovation
- Frequent guest speaker throughout the Trojan network and global communities, including USC Board of Trustees, Academic Affairs Committee and Student Affairs Committee
- Recipient of Provost's Mellon Award for Undergraduate Mentoring

#### **Chrysalis**

Los Angeles, CA

*President and Chief Executive Officer*

2001 - 2007

- Managed all aspects of this non-profit agency dedicated to helping homeless and economically disadvantaged people change their lives through jobs. Chrysalis consisted of three Los Angeles offices (Skid Row, Santa Monica and Pacoima), that served almost 2,500 people each year with a 93% success rate.
- Managed two nationally recognized social enterprises that provide transitional employment for almost 1,000 clients annually and produce over \$4 million in revenues.
- More than doubled the size of the agency, while adding 1,400 donors resulting in a 91% privately funded enterprise. Overall responsibility for an \$8.2 million budget with 50 full time employees.
- Drafted and passed through LA City Council the *Transitional Jobs Opportunity Program* – the first law in the country to give bidding preferences to non-profit job readiness programs.
- Developed numerous unique business partnerships that were highlighted by *Forbes*, *Worth*, *Business Week* and numerous industry specific publications. Received recognitions and awards from dozens of governmental, private sector and non-profit organizations.

**Prudential Securities**

New York, NY and Los Angeles, CA

*Managing Director*

1989-2000

- Co-Manager of National Public Finance Department and Manager of the West Coast Region.
- Served as advisor and banker to senior public officials in more than 40 states.
- Senior managed nearly \$25 billion in innovative debt financing.
- Responsible for offices in Miami, Dallas, Los Angeles and San Francisco.

**Chase Securities**

New York, NY

*Assistant Vice President*

1988 - 1989

- Assisted Executive Vice President in managing both Public Finance Investment Banking and Municipal Trading.

**Bear, Stearns & Co. Inc.**

New York, NY

*Associate*

1986 - 1988

- Assisted in numerous public-private financings requiring developed expertise in international finance, corporate finance and mortgage-backed securities. Served as financial advisor to the Panama Canal Commission and the U.S. for the Department of Agriculture.

**E.C. Farnsworth & Co.**

New York, NY

*Corporate Finance Banker*

1983 - 1984

- As a partner, managed all aspects of the Initial Public Offering business for the boutique investment bank.

**Laidlaw, Adams & Peck**

New York, NY

*Vice President*

1980 - 1983

- Worked as an Underwriter on the IPO trading desk.

**PRIOR ACADEMIC EXPERIENCE**

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**UCLA School of Public Affairs**

Los Angeles, CA

*Faculty Member, Senior Fellow*

2005- Present

- Developed and taught three graduate courses: *Non-Profit Management and Strategic Planning*; *Non-Profit Finance and Fundraising Strategy*; and *Models of Self-Sustaining Non-Profits*.
- Senior Fellow in the School of Public Affairs

## EDUCATION

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### **The Wharton School, University of Pennsylvania**

Philadelphia, PA

*Master in Business Administration*

1984 - 1986

- Majors in Finance and Public Policy Management
- Concentration in Strategic Planning

### **SUNY at Stony Brook**

Stony Brook, NY

*Bachelor of Arts*

1976 - 1980

- Major in Econometrics with Honors
- Winner of the 1980 Award for Outstanding Leadership and Service to the Stony Brook Community.

## ADDITIONAL ACCOMPLISHMENTS

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- Advisory Board, The Roberts Enterprise Development Fund (REDF)
- Advisory Board, USC Casden Institute for the Study of the Jewish Role in American Life
- Trustee of the Jewish Community Foundation
- Member of the USC Neighborhood Task Force, and USC Homeless Initiative
- Past Commissioner of the Los Angeles Fire and Police Pension Fund
- Past Member of the Los Angeles Workforce Investment Board Ad Hoc Committee on Training and Worksource Center Certification Team
- Past Chair, Central City Association Public Safety and Homelessness Committee
- Past Member, Steering Committee – Los Angeles/Tel Aviv Partnership Poverty Task Force
- Frequent speaker and panelist on social enterprise, poverty, homelessness, employment issues and non-profit management
- Profiled by California CEO Magazine and numerous local publications
- Highlighted as a Leading Social Entrepreneur by the Center for Public Leadership at Harvard's John F. Kennedy School of Government
- Advisor to numerous non-profits and NGO's and for-profit social enterprises.
- Subject of UCLA School of Public Affairs published case study

### **Fellowships and Awards:**

- Faculty Fellow, USC Price Center for Social Innovation
- Senior Fellow, UCLA School of Public Affairs
- Fellow, The Wexner Heritage Foundation
- USC Provost Mellon Award for Undergraduate Mentoring
- Nominee for USC Trojan Parents Steven Sample Award for Teaching and Mentorship
- Faculty Member, Torch and Tassel Chapter of The Mortar Board.