



Dr. Katherine Wheatle
Liberal Arts '08
Penn State Forward Candidate

Board of Trustees Candidate Questionnaire

1. Engagement with Penn State: Describe your connection to Penn State and why it has prepared you to guide the University's strategic future.

Penn State has unlocked many opportunities for me, motivating my career to make higher education more accessible and affordable. I want to serve on the Board to multiply my impact, fiercely advocate for students and employees, and partner to advance campus safety, educational equity, and community relations. We Are all Penn State and it would be an honor to preserve and expand that legacy for years to come.

I became the first in my family to graduate college when I earned a bachelor's degree from Penn State in 2008. This accomplishment would not have been possible without Penn State's educational access programs and resources. I received financial support as a Bunton-Waller Scholarship recipient and conducted research as an undergraduate student as a Ronald E. McNair Postbaccalaureate Scholar.

The Penn State community instilled in me the importance of service and I felt motivated to give back early on. One way I did this was serving as a student mentor and coordinator for the S-Plan Peer Mentoring Program (now known as the BLUEprint Peer Mentoring Program in the Paul Robeson Cultural Center). Through that role, I supported first-year and change-of-campus students with their academic, social, and cultural development as they acclimated to the University Park campus. In this work, I learned that student achievement, success, and completion are all impacted by a student's social environment, access to resources, efficacy to ask for and use resources, sense of belonging, and feeling safe. It moved me to spend my time at Penn State—and my career—supporting students to achieve and complete.

After earning my master's in public health at Emory University, I returned to Penn State. As a member of the University Health Services staff, I worked directly with students, preparing them to educate and support their peers through their most vulnerable experiences on campus. Now, as an alumna, I continue to support Penn State students as a mentor in the Liberal Arts Alumni Mentoring Program. In 2020, I humbly received the Outstanding Alumni Award from the African American Studies Department. And I continue to give to efforts at Penn State that support students.

These experiences - among others - have tied me to an institution that I love and the communities that I serve. The University's strategic future is tethered to student success and completion just as it will be impacted by today's shifting economic and legal landscape. My professional and personal experiences directly with students and in research, policy, and philanthropy will be an asset to this Board at this time.

2. Experience with governance/board service: What experience do you have participating in a collaborative fiduciary decision-making body?

I will approach collaborative decision-making on the Board as a multi-step process: (1) building relationships; (2) gathering and processing information; and (3) reaching outcomes that align with the institution's mission and vision. I have honed each step through my professional experiences, including past service on collaborative decision-making bodies.

I served as a founding board member for an emerging non-profit family foundation established by a fellow Penn Stater. I contributed to the organization's founding bylaws, developed its first programs, and provided oversight of its first financial reports. I also served on the Board of Directors of the Association for the Study of Higher Education (ASHE), through an elected two-year term representing the association's graduate and professional student membership. While there, I developed retention and fundraising strategies and grew association membership. And my professional work in higher education research and philanthropy has helped me build the skills employed in institutional governance.

Building relationships: When I served in these organizations, I prioritized building relationships within these bodies and with the people I worked for or represented. For example, while on the ASHE Board, I advocated for increased student programming, realizing through my relationships with the students I represented, that when graduate students made significant professional and personal connections through the association, they were more likely to continue their membership. Similarly, when they received financial support, they were more likely to donate. And through my relationships with ASHE members representing faculty internally on the Board, they realized the potential impact I saw, even though these new investments would not directly benefit their constituency. Working together, we were able to realize long-term engagement and impact to improve Board outcomes generally.

Gathering and processing information: I have spent over a decade interpreting data to evaluate project and institutional performance, through my various roles in higher education, including nonprofit and government organizations and foundations. My work in philanthropy focuses on developing, executing, and evaluating multi-million-dollar grantmaking strategies. I will leverage these skills gathering and process information as a Board member. I am also excited to apply my data-interpretation skills to make data more comprehensible to others. In fact, I redesigned and improved annual assessments by moving them from a compliance-based to a performance-based model early in my career for the federal government. I will apply these skills to help chart a data-driven path forward on the Board, whether through developing new data methodologies for internal Board decision-making or tracking outcomes to share with the broader Penn State community.

Reaching outcomes together: I view diversity—of life experience, background, and thought—as assets in decision-making bodies, especially when members have shared goals, values, and mission but hold competing priorities. The first times I strengthened this skill were, in fact, at Penn State, while co-chairing the 2008 Class Gift Committee and the Commission for Racial/Ethnic Diversity. Since then, I have further developed this skill at the Lumina Foundation, where I worked across stakeholder groups, including key federal policy and research partners, civil rights organizations, student advocacy groups, intermediaries, think tanks, and other policy advocates to enhance understanding of racial equity and deepen the collective commitment to achieving it. As you may imagine, these groups had different priorities, including a need to satisfy constituents and donors, balance budgets, or achieve particular policy priorities. But through my work keeping our common goals front of mind, managing relationships, and listening to and working with others, we were able to forge a path forward together. Inclusive decision-making practices that have been effective in my work include building partnerships, supporting coalitions, learning from advisory boards, and identifying and securing feedback loops from the communities we serve. When we make decisions that are inclusive from the beginning, we avoid and minimize unintended consequences and ensure sustainability of the outcomes we want to realize.

3. **Brings 1-2 skills from skillset inventory: What of the skills reflected in the Board Skillset Inventory would you bring to your service as a Penn State trustee and how did you develop this skill/these skills?**

If elected to the Board of Trustees, I will bring at least three skills to my service that the Board self-reports a need for: (1) diversity, equity, inclusion, and belonging (DEIB); (2) higher education; and (3) development & fundraising.

Diversity, Equity, Inclusion, and Belonging (DEIB)

I hold a bachelor's degree in African and African American Studies and a master's degree in Public Health, with a focus on mental health. As a student, I worked to make Penn State a more diverse and inclusive community. I served as Student Co-Chair of the University's Commission on Racial Equality and Diversity (CORED). This work illuminated Penn State's long contentious history with race, gender, and other important identities and forms of difference within our student and staff communities. I continue this DEIB work today, researching inequalities in higher education and promoting equity through my grant-making work. Today, I work with philanthropic colleagues across a variety of issue areas to support and strengthen the capacity of justice and equity organizations working towards aligned outcomes and goals. Environmental justice and sustainability, educational equity, defending a multi-racial democracy, and reproductive justice and equity are issues that impact us all. I am ready to use my social science background to analyze culture and policies to improving all Penn Staters' experiences.

Higher Education

My career has focused on higher education attainment and affordability. I earned my Ph.D. in Higher Education from Indiana University and have worked 12 years in a variety of roles in higher education, including student affairs practitioner, researcher, advocate, and grant-maker. I have conducted award-winning research on the history of funding inequities in higher education and student debt. I have consulted for the U.S. Department of Education Office of Postsecondary Education, where I evaluated grant-programs. And I have taught college and graduate courses, including at Penn State as an Instructor in Health and Human Development and as a Community Health Educator at University Health Services.

Development & Fundraising

I had my first formal opportunity in development and fundraising at Penn State, serving as a co-chair of the 2008 Senior Class Gift Committee. We raised \$198,000 for the Gateway Element at Atherton Street and Curtin Road. I gained invaluable experience engaging the graduating class, inspiring them to give in a way that benefitted the broader Penn State community. Today I work professionally in philanthropy and have developed a network of private, non-profit funders and donors that span issues including education, environment and climate, democracy, performing arts, criminal justice, workforce, economic justice, and public health. I plan to endow a need-based, last-dollar scholarship within Penn State's College of Liberal Arts and am excited to apply my experiences raising money on Penn State's Board of Trustees to multiply my impact by motivating others to give, too. Today, I have worked professionally in philanthropy for 6.5 years and developed a network of private, non-profit funders and donors that span issues including education, environment and climate, democracy, performing arts, racial and gender justice, workforce, economic justice, and public health.

4. What about your life experience and unique background makes your voice important to be heard at the Board of Trustees?

I am a first-generation, Pell-grant recipient, with experiences both as a Penn State student and staff member. This professional background will enable me to bring new skills to the Board. I am prepared to bring my life experiences to the Board with humility, to advance decision-making that reflects the diverse experiences of those in our Penn State community.

I attended public schools, received free or reduced lunch, was a Pell-grant recipient, participated in a TRIO program, and owe student loan debt. I was able to go to Penn State only because I received financial aid, including Pell Grants. When I completed my degree, I became the first in my family to

graduate college. While I attended Penn State, I worked to make the University responsive to students whose experiences are often not represented in decision-making bodies. I am Black woman and a child of immigrants. While Penn State's Board is moving in the right direction to diversify itself, its current representation echoes the stagnation of diversity on many corporate and university boards. The absence of representative diversity of all types, coupled with a Board-wide lack of capacity to productively engage the institution on issues about race, leaves Penn State vulnerable and is to the detriment of the institution.

I am among the first millennials going into their 40s with growing families, taking care of parents and other people they call family, alongside managing unprecedented levels of student loan debt. These folks in the thick of their lives have limited time and resources to invest in the institutions that were key to their development. And, with the volatility of labor and economic markets since 2008, many find it difficult to leverage the promise of social mobility into a reality. I feel lucky that I have the time and energy to give back to Penn State, an institution that has unlocked many opportunities for me, to represent alumni, and specifically to offer the perspective of an alum who graduated in the early 2000s, a perspective that is currently absent.

Last, my formal educational background and professional experiences—as a student affairs practitioner, higher education historian and policy research, and strategic grant-maker—is not currently represented on the Board. I've worked in only nonprofit organizations – from universities to policy to philanthropy – because I believe in public service. I believed in the invisible social contract that by using resources like scholarships, grants, and loans for my education, I can also work in mission-focused organizations for the public good. I landed my first full-time job at Penn State. I worked in higher education policy research where I published work that uplifts enrollment management strategies that support the re-enrollment and completion of students who stopped out. Moving into higher education philanthropy, I developed and advanced strategies to increase educational attainment and make postsecondary education more affordable. There is no one on Penn State's Board who can access the social network and Zcapital that I bring within Penn State's alumni community and across higher education, policy, and philanthropy.

Biography

Katherine Wheatle, Ph.D., is a higher education policy expert and Penn State Forward candidate. As a Pell-grant recipient, she knows education is a vehicle for economic mobility; she works to make education attainable for all.

Dr. Wheatle earned a bachelor's from Penn State in 2008, becoming the first college graduate in her family. She benefitted from educational access programs, and strove to give back. She fundraised as Senior Class Gift Co-Chair and a THON dancer and broke down barriers for others as NAACP Secretary and Racial/Ethnic Diversity Commission Co-Chair. After earning her master's in public health, Wheatle returned to Penn State as a Community Health Educator and Health and Human Development instructor.

She works at the Hewlett Foundation as a program officer, supporting nonprofit organizations and leaders. Before then, she analyzed how institutions can improve degree completion rates at a nonprofit. She developed grant program assessment methods for the Department of Education. And she advocated for innovative policy and led a \$70m portfolio to close opportunity gaps at the Lumina and Packard Foundations.

Wheatle holds a Ph.D. in Higher Education and has published many articles, including on land-grant universities, student debt, and veterans' educational access. She supports students through Liberal Arts mentorship programs and remains connected to Penn Staters through Delta Sigma Theta Sorority, Inc. and Parmi Nous. She won the African American Studies 2020 Outstanding Alumni Award.

She grew up in Paterson and Prospect Park, NJ, now lives in California, and is a lifetime Alumni Association member.

Position Statement

Katherine Wheatle is running with **Uma Moriarity** and **Daniel Zahn** to move **Penn State Forward**. They are committed to advancing academic and institutional excellence with four policy focus areas.

Educational equity. Growing up, Wheatle attended public schools and received free/reduced lunch. She still owes student loan debt. Financial aid made her Penn State education possible. As a trustee, she will lead data-driven and structural solutions to guarantee an affordable education for all Penn Staters, including public University budget review and responsible endowment management so savings may be reallocated towards decreasing tuition and providing direct aid.

Workers' rights. Wheatle's first full-time job was at Penn State, working with students. She knows that for employees to support students well, our University must support employees, including through a labor union recognition policy, living wages across the Commonwealth, and stringent policies against harassment. She's ready to fight for these policies as a trustee.

Governance reform. As a student, Wheatle saw firsthand how University leadership failed to implement community recommendations. She will advocate for accountability and democratic voice, for instance, requirements that the Board review community recommendations publicly and, when choosing new Board members, solicit nominations from the University community and justify chosen members.

Climate action. Wheatle believes Penn State must make campus operations greener and strengthen our academic leadership in energy research and education with a focus on renewables to remain competitive in student recruitment and career outcomes.

Learn more about **Katherine, Uma, and Daniel** and their plans at [PSUForward.org/vision](https://psuforward.org/vision).