

Eileen M. Pezzi
The Upstate Foundation
750 East Adams Street
Syracuse, NY 13210
315-464-7853 (Business)

PROFESSIONAL OBJECTIVE:

To obtain a senior level position within a university, family foundation or corporate office, focusing on philanthropy in support of the owner's mission.

EXPERIENCE:

Vice President for Development 1996-Present

Upstate Medical University, Syracuse, NY

General Description: Oversee the activities of the Upstate Foundation, the Foundation's \$180.6 million asset base and our 41 member Board of Directors. Also responsible for overseeing the University's Health Professions and Nursing Alumni relations endeavors and the Foundation's communications function. And generally responsible for organizing and implementing a comprehensive development plan focusing on annual major gifts and endowment campaigns, corporate and foundation giving, planned giving, named giving, donor relations, grateful patient and family programs, fund development and special events.

Key Accomplishments:

<u>Growth Highlights</u>						
	1995	2000	2005	2017	12 year growth	22 year growth
Asset Growth in millions	\$15.29	\$23.80	\$40.90	\$180.30	341%	1079%
Annual Contribution in millions	\$2.78	\$4.02	\$9.42	\$16.01	70%	476%
Board Membership Presidents, CEOs, Senior Level Execs	7	11	15	17	13%	143%
Number of Endowment Funds	51	80	101	280	177%	449%
Number of Restricted Funds	222	268	346	652	88%	194%
Size of our data base		49,554	67,539	117,191	74%	
Number of donors per year	3,134	5,043	8,591	10,670	24%	240%
Number of major Gifts, \$5,000 and up	94	158	287	206	-28%	119%

2017 Awards Scholarships and Grants, ROI against Upstate Medical University Investment

Contributions	Awards for Upstate	SUNY GIK	ROI
16.01M	8.4M	320K	\$26.60:\$1

Key Accomplishments (cont'd):

- Conducted successful Children's Hospital Campaign, feasibility study said we could raise \$15 million, Foundation surpassed goal and raised \$21.9 million.
- Conducted successful Upstate Cancer Center Campaign, feasibility study said we could raise \$5 million, Foundation surpassed goal and raised \$17.1 million.
- Designed and implemented first ever Annual Fund for University Hospital.
- Developed and implemented first ever Grateful Patient and Family Program.
- Developed Planned Giving Program and established the Upstate Legacy Society, honoring individuals naming Upstate in their will.
- Established first ever collections policy and program implementation.
- Updated and implemented donor acknowledgement program.
- Increased in-kind support from area businesses and enhanced volunteer recognition programs.
- Designed and implemented first ever Recruitment and Retention Program (R&R) at the Foundation. Average rate of retention for the staff at the Foundation is 9.5 years. Specifically, development officers have remained with the Foundation for five years. These statistics are two to three times higher than national retention rates.
- The Upstate Foundation received Upstate Medical University's Team of the Year Award in both 2004 and 2014.
- Mr. Golisano's \$6 million gift to the Children's Hospital Campaign is the second largest philanthropic gift in the history of Upstate and is also one of the top 5-10 gifts made to SUNY.
- Mr. and Mrs. Nappi's \$8 million gift to name the Nappi Longevity Institute is the largest philanthropic gift in the history of Upstate and is also one of the top 5-10 gifts made to SUNY (2017).
- Foundation consistently ranks within the top five fundraisers in the Annual SUNY Fundraising Report.
- SUNY development placement in research ranked fourth place overall in the Annual SUNY Fundraising Report.
- Ms. Pezzi was named as the area's top development professional and one of the region's philanthropic heroes for 2016 by the Association of Fundraising Professionals (AFP)-Central New York Chapter.
- The Foundation's endowment investment returns consistently exceed the average and median annual returns of more than 800 college and university endowments and affiliated foundations in each of the last seven years as reported in the NACUBO (National Association of College and University Business Officers)-Common Fund study of endowments.
- Successfully negotiated the procurement and transition of the of the CMNH Southern Tier New York fundraising market (Broome, Delaware, Tioga and Chenago Counties) from Geisinger to the Upstate Foundation (2017).

Member of the Jim and Juli Boeheim Foundation Board of Directors, the American Association of Academic Medical Centers (AAMC), Council for the Advancement and Support of Education (CASE), 2003 CASE, Circle of Excellence Award and Association of Health Professionals (AHP).

Vice President for Financial Development 1990-1995

The Capital District YMCA, Albany, NY

Key Accomplishments:

Promoted from director of development in 1990, to vice president for financial development in 1992.

Capital Campaign:

Organized and orchestrated a \$5 million Capital Fund Drive that realized \$5.3 million and is perceived as the most successful campaign by a not-for-profit in the Capital region.

- Coordinated two feasibility studies.
- Developed campaign materials (campaign plan, case statement, video, brochures).
- Planned and executed cultivation events, devised multi-level donor recognition programs, conducted prospect identification and major gift solicitation, recruited members of top leadership team.
- Managed a four person development department along with nine additional reports.
- Trained and managed more than 1,000 volunteers.

Annual Campaign:

- Designed and implemented face to face annual support campaign for newly established regional YMCA. Increased support from \$60,000 to \$200,000.
- Instituted quarterly Financial Development newsletter.
- Executed annual appeal to broaden constituency support through direct mail program.
- Recruited top leadership and other volunteer support for campaign.

Endowment:

- Designed and implemented newly established endowment program.
- Recruited attorneys, CPAs, trust officers and other appropriate volunteers to assist with program implementation.

Special Events:

- Secured corporate underwriting.
- Responsible for creative theme development. Recruited volunteers for special events committee. Designed invitation, programs and press kits. Coordinated vendors, volunteers and details for smooth running events. Raise more than \$80,000 annually.

Volunteers:

Recruited and directed high level, visionary volunteers; coordinated staff for Board Financial Development Committee; trained and manage over 400 volunteers annually for annual campaign.

Grants Foundation (sampling):

Secured: \$3.3 million HUD Grant, \$500,000 Kresge Grant, \$100,000 Hearst Grant, \$40,000 from local foundations, and trusts, \$4.3 million in Federal, State and Local grants, and \$91,500 Community Development Block Grant.

Financial Responsibilities:

- Managed all accounting and financial management systems for annual and capital campaign collections. Involved in design and implementation of software program for gift recording. Supervised all Financial Development computerized system. Supervised stock and investment transactions. Responsible for management of \$3.3 million HUD project. Produced income statement, projection and delinquency reports for board finance committee. Established Capital District wide collections program.

Project Director:

- Responsible for implementation of construction projects including consultant and contractor selection quality control, government approvals, program structure, occupancy, budget and set up of operations.
- \$3.2 million senior housing project (47,000 square feet).
- \$200,000 satellite YMCA (20,000 square feet)

Acquisition and Merger Coordinator:

- Responsible for initiating, negotiating and closing on mergers between area community service organizations and the Capital District YMCA, including constructing merger agreement, legal aspects, conducting community forums, governmental approvals and publicizing events.

- Guilderland Community Center (net worth approximately \$1.5 million).
- Community Human Services (net worth approximately \$300,000 - pending).
- Albany YWCA (net worth approximately 800,000).

Executive Director 1988-1990

Ballston Lake Community Human Services (CAP Agency), Burnt Hills, NY

Responsible for:

- Program Management
- Personnel Management
- Planning, development and implementing Programs
- Public Relations
- Fiscal Management
- Reporting to Board of Directors
- Networking and consulting to various community actions programs
- Creative collaboration between human service agencies
- Philanthropic campaigns (annual/capital)

Executive Director 1986-1988

Mechanicville Area Community Services Center, Inc., Mechanicville, NY

Responsible for:

- Program Management, Planning and Development
- Personnel Management
- Philanthropic campaigns including annual campaigns and capital campaigns
- Public Relations
- Fiscal Management
- Reporting to a board of directors

CAPABILITIES:

- Excellent organization and administrative abilities
- Strong written and verbal communications skills
- Proven ability securing Federal, State and local grants
- Skillful in ability to recruit, train and work with strategically placed community leaders
- Demonstrated success in annual and capital campaigns, endowment development and lead gift procurement

EDUCATION

M.S.P.S.A. 1990

Russell Sage College, Albany, NY

Major: Public Service Administration

B.A. 1984

Assumption College, Worcester, Mass

Major: Social Rehabilitation

Minor: Psychology

A.A. 1982

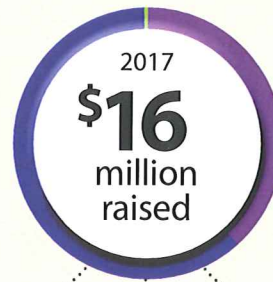
Green Mountain College, Poultney, VT

Major: Human Services



Total assets managed

Dramatic growth – total assets have skyrocketed by nearly 800 percent over the past 21 years, from just over \$20 million to over \$180 million.



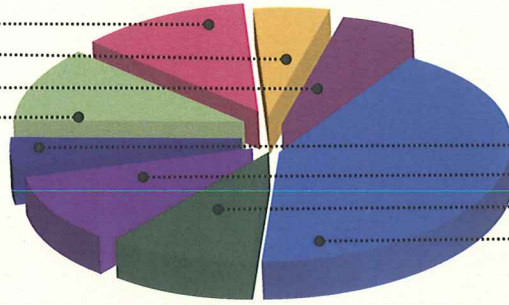
2017 was an unprecedented year in the Upstate Foundation's 42-year history:

Nearly **\$8.4 million** was awarded to support Upstate Medical University's programs and services, patients, faculty, students and researchers; more than **\$16 million** was raised.



2017 Strategic Investment Allocation

- 11.5% Core Fixed Income Plus
- 5.3% U.S. Small Cap Growth
- 5.3% U.S. Small Cap Value
- 11.0% Core Fixed Income



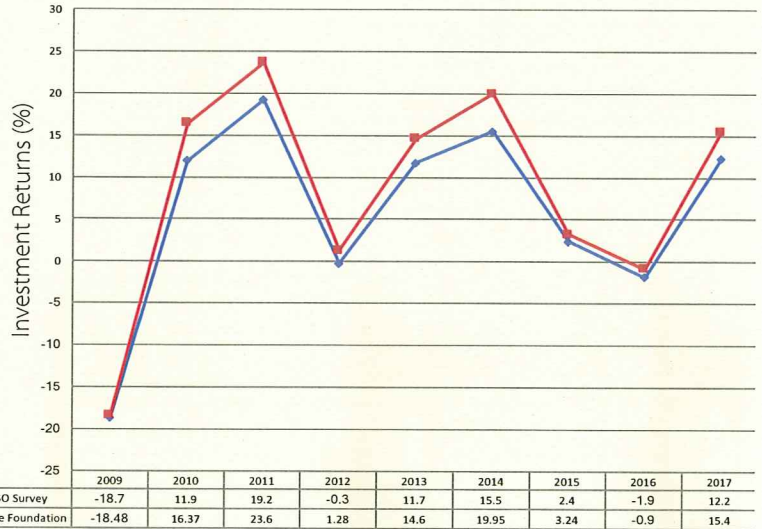
- 4.3% Real Assets
- 10.6% International Equity Growth
- 10.2% International Equity Value
- 41.8% U.S. Large Cap Equity



Callan clients of \$1-\$100 million for past 7 years

Investment Performance vs. Benchmark

The Upstate Foundation's annual endowment investment performance ranked 38th of 798 colleges and universities in the recently published National Association of College and Universities Business Officers survey. The returns exceeded those posted by all other reporting SUNY schools as well as all Ivy League schools. The Foundation's five-year rate of return ranked 33rd of 727 reporting institutions.



CAMPAIGNS

Capital Campaigns



Upstate Golisano Children's Hospital
2009 – \$21 million for a much needed resource for the region's sick and injured children.

Upstate Cancer Center
2014 – \$17 million state-of-the-art outpatient cancer treatment facility for adults and children.

Multi Targeted Campaigns



- Ongoing
- Scar laser initiative for the Clark Burn Center
 - Brighter Beginnings Campaign
- Concluded
- Pediatric Emergency Department campaign

Annual Campaigns

- Friend in Deed - Upstate University Hospital
- Upstate Golisano Children's Hospital
- Upstate Cancer Center
- The Power of Us! - Employee giving campaign

FUNDS



DONORS

