

PATIENT
CARE



RESEARCH



EDUCATION



COMMUNITY
HEALTH &
WELL-BEING

WHERE YOUR GIFT IMPACTS THE
HEALTH OF THE ENTIRE REGION.

UPSTATE
FOUNDATION

Our mission: Impacting patient care, education, research, and community health and well-being through charitable giving.

You can make a difference

No one can make more of a difference in the future of health care, education, biomedical research, and community health and well-being than you. Even though Upstate Medical University is part of the State University of New York system, less than 2 percent of its annual operating budget for the campus is received directly from the state; and Upstate University Hospital and its entities do not receive any operating support from the state. It is very dependent on other means of support including that from valued donors, grateful patients, devoted volunteers, loyal employees, active board members and more. You can touch the lives of so many through your support of Upstate Medical University. **You can make a difference.**

Support at a Glance



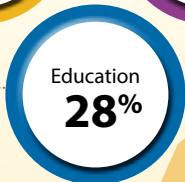
DRAMATIC GROWTH

Total assets managed has increased more than tenfold over the past 25 years, from \$20.1 million to nearly \$225 million.



AWARDS, SCHOLARSHIPS AND GRANTS

Over the past 20 years, funding that the Foundation gives each year in the form of awards, scholarships and grants has grown from \$2.46 million to a five-year average of \$6.8 million.



\$20.1m

\$225m

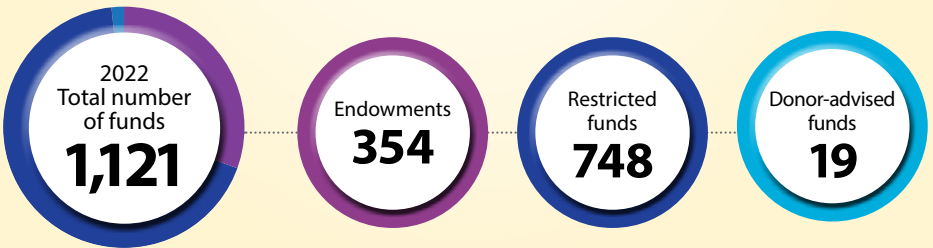
You can make a difference

The **Upstate Foundation** was founded in 1976 as a 501(c)3 not-for-profit corporation to receive and administer gifts and bequests for charitable purposes with a focus on patient care, education, scientific research, and community health and well-being. A public charity with the ability to make distributions to any qualified nonprofit organization, the Upstate Foundation's primary orientation is supporting the mission of Upstate Medical University.

The Foundation has a staff who, with an engaged board of directors, manage over 1,100 funds; conduct multi-year, multi-million dollar capital and endowment campaigns; administer alumni associations for the colleges of Nursing and Health Professions; implement named giving and planned giving programs, and a grateful patient and family program; run annual campaigns for Upstate University Hospital, Upstate Golisano Children's Hospital and the Upstate Cancer Center; and sponsor several signature fundraising events annually. In addition, the Foundation is home to the local chapter of the Children's Miracle Network Hospitals.

The Foundation is largely self-supporting with the assets it manages totaling nearly \$225 million.

For more information, visit UpstateFoundation.org



Campaigns

ANNUAL FUNDS

Annual funds provide continuous support for three primary areas at Upstate:

- Upstate University Hospital and Upstate Community Hospital (the campaign is called Friend in Deed)
- Upstate Golisano Children's Hospital
- Upstate Cancer Center

Annual funds are an important source of revenue for many unmet needs – and are frequently the only source of funding for valuable initiatives.

CAPITAL / MULTI-TARGETED CAMPAIGNS

The Foundation successfully planned and implemented various multi-million dollar capital campaigns to assist in the construction of two new facilities on campus. In 2014, doors of the Upstate Cancer Center opened, marking the conclusion of a campaign in which \$17 million was raised for a new state-of-the-art outpatient cancer treatment facility for adults and children. The grand opening of the Upstate Golisano Children's Hospital in 2009 celebrated the Foundation's success in raising more than \$21 million for a much needed resource for the region's sick and injured children.



Following its signature capital campaigns, the Upstate Foundation conducted smaller capital campaigns raising \$6.5 million for the Golisano Center for Special Needs, and \$1 million for the maternity unit and nursery at Upstate Community Hospital.

In addition, the Upstate Foundation has been continuously involved in fundraising for other important priorities including \$1.2 million for the pediatric emergency department at Upstate University Hospital, and is expecting to raise \$3 million in the current campaign for child and adolescent mental health.

Programs

GRATEFUL PATIENT AND FAMILY PROGRAM

The Grateful Patient and Family Program gives patients and their families the opportunity to make a gift to Upstate in appreciation for the quality care they receive from physicians, nurses, and other health care professionals and hospital staff.



PLANNED GIVING PROGRAM / UPSTATE LEGACY SOCIETY

Integrating philanthropy into estate plans can be one of the most rewarding decisions one can make; a donor can maximize giving and make an impact through the Upstate Foundation for the well-being of Central New York.

Options include:

- will or trust
- IRA
- life insurance
- retirement account
- publicly traded stock
- charitable gift annuity
- real estate

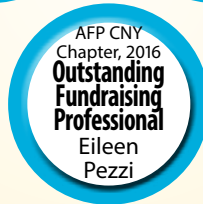
Each vehicle offers different opportunities and tax advantages.

The Foundation established the Upstate Legacy Society to pay tribute to those who have included Upstate in their estate plans.

NAMED GIVING PROGRAM

To the Upstate Foundation, a name is a valued and treasured commodity. Its significance is evident by the number of successful capital and endowment campaigns that have raised millions of dollars throughout the Foundation's history; by the hundreds of named funds managed at the Foundation; and by the hundreds of named rooms and areas commemorating donor generosity. A name gives people a compelling reason to give, and named gifts keep legacies alive forever.

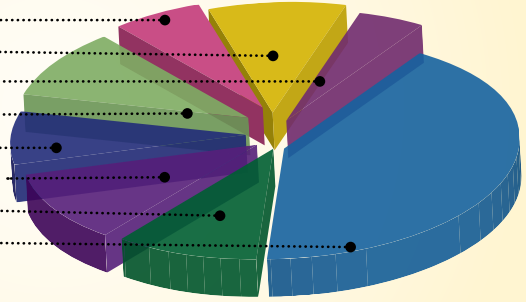
Upstate Foundation Recognition



Investments

2022 Investment allocation

6.2%	U.S. Small Cap Value
9.4%	Core Fixed Income Plus
4.7%	U.S. Small Cap Growth
9.8%	Core Fixed Income
7.7%	Real Assets
10.7%	International Equity Growth
10%	International Equity Value
41.5%	U.S. Large Cap Equity



Corporate Partnerships

The Upstate Foundation's corporate supporters play a vital role in helping Upstate fulfill its mission to provide excellent patient care; educate the next generation of health care providers; advance knowledge through medical research; and impact community health and well-being. The Upstate Foundation offers multi-year event sponsorships and naming opportunities that corporations can customize to meet their own interests and financial resources, and level of visibility desired.

Special Events

In addition to major gift work, special events are an integral part of fundraising at the Upstate Foundation, and include the Foundation's annual signature events, community events and fundraisers, retail partnerships and support from young philanthropists.

FOUNDATION SIGNATURE EVENTS include the Upstate Gala, Upstate Open, Upstate Towsley Pro-Am, Radiothon for Kids, Call In for Cancer and Walk Run For Kids.

RETAIL PARTNERSHIPS As a longtime Children's Miracle Network Hospitals (CMNH) partner, Upstate Golisano Children's Hospital is supported by many retail businesses in the community that raise money throughout the year to help sick and injured children.

COMMUNITY EVENTS AND FUNDRAISERS are planned and implemented by individuals, families and organizations, and are as varied in nature as the areas of Upstate they support. Two of the more high profile events include Father Daughter Valentine Ball and Paige's Butterfly Run.

YOUNG PHILANTHROPISTS

Many area school children, college students, youth sports groups and community organizations are active in raising money for Upstate Golisano Children's Hospital, Upstate Cancer Center and other areas at Upstate.

Alumni Associations

As the region's only academic medical university, Upstate features four colleges in addition to its teaching hospitals. The Foundation supports the colleges of Medicine, Graduate Studies, Nursing and Health Professions by raising funds for student scholarships, faculty enrichment, laboratory equipment and educational programs.

In addition, the Upstate Foundation administers the Nursing Alumni Association and Health Professions Alumni Association, which are an important source of funding for scholarships, faculty development and student experiences outside the classroom, professional networking, equipment and technology, and other program needs.

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as of 6/2023

UPSTATE FOUNDATION

Where your gift impacts the
health of the entire region.

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