



# Penn Medicine

Chief Advancement Officer  
Penn Medicine Development & Alumni Relations  
Philadelphia, PA

## THE SEARCH

The University of Pennsylvania (Penn) is among the nation's oldest and most highly regarded universities in the world. Its four undergraduate and twelve graduate and professional schools provide extraordinary educational opportunities to 28,000 students and a unique professional environment for 5,100 faculty. The University is also home to [Penn Medicine](#), which is comprised of the [Perelman School of Medicine](#) (PSOM) and the [University of Pennsylvania Health System](#) (UPHS). Penn Medicine's educational and clinical enterprise is an integral and fully integrated component of the University, to a degree that is unusual among its peers. Its leaders are citizens of the University and share its mission, goals, and responsibilities. Faculty and staff routinely collaborate with and meaningfully contribute across Penn's institutes, centers, and schools, and Penn Medicine's culture embraces the University's values of inclusion, innovation, and impact.

Philanthropy plays a critical role in supporting Penn Medicine's \$11.9 billion enterprise dedicated to excellence in the related missions of medical education, biomedical research, and patient care. The institution seeks a fundraising expert with a deep track record of success leading teams and programs in a complex environment as its next Chief Advancement Officer (CAO). Reporting directly to [Dr. Jonathan Epstein](#), Dean of PSOM and Executive Vice President of the University of Pennsylvania for the Health System (Dean/EVP), and [Kate Griffo](#), Vice President (VP) for Penn Development and Alumni Relations (DAR), the CAO will also work closely with UPHS CEO [Kevin Mahoney](#). The CAO will oversee all medical fundraising programs and guide the future of Penn Medicine philanthropy following its successful \$1.68 billion *The Power of Penn Medicine Campaign*, which closed in 2021.

In total, the CAO will oversee a team of 145 FTEs across an enterprise that raised \$230 million in commitments in Fiscal Year 2024. The CAO will manage an annual operating budget which presently stands at ~\$22 million. Success for the next CAO will be, in part, defined by the ability to serve as an effective partner to the Dean/EVP and VP, lead and inspire the team to meet aggressive goals, and educate and engage all members of the broader Penn Medicine community in philanthropy and engagement efforts.

The CAO will address a wide range of opportunities and challenges, including but not limited to the following:

- Develop and implement an innovative and data-informed advancement program that will support the strategic plan and remarkable legacy of Penn Medicine at a time of global change.
- Bolster infrastructure and resources to support future fundraising efforts, including the implementation of a more robust principal and transformational gift enterprise and a future comprehensive campaign.
- Build upon existing success with grateful patients while growing support for basic science fundraising opportunities, particularly among unaffiliated prospects, as well as deepening alumni engagement efforts.
- Enhance volunteer engagement and recruitment opportunities, supporting Penn Medicine's Board of Trustees and identifying friends and donors to serve as future volunteer leaders.
- Leverage and build upon existing partnerships to educate and inspire key faculty and academic leaders to engage with Penn Medicine DAR in mutually impactful ways.
- Strengthen collaboration and integration between Penn Medicine DAR and its affiliated hospitals.
- Deepen collaboration between Penn Medicine DAR and University DAR, as well other schools, Children's Hospital of Philadelphia and other partner hospitals, in support of transformational, multi-disciplinary fundraising opportunities.
- Motivate and empower team members of all levels and roles across Penn Medicine DAR, ensuring each individual is enabled to professionally develop and achieve their goals.

The ideal candidate will have significant senior-level organizational and staff management experience in a complex research institution, ideally an academic medical center with both grateful patient fundraising and basic/translational research fundraising. This leader will have a strong track record of success personally cultivating and stewarding transformational gifts with exceptional interpersonal and collaborative skills. The CAO will be responsible for motivating a large and complex team and engaging key leaders in the fundraising process. The ideal candidate will bring a deep commitment to the institution's mission and a desire to fully invest in the Penn Medicine, University of Pennsylvania, and Greater Philadelphia communities.

Penn Medicine has retained Jack Gorman of Isaacson, Miller, the national executive search firm, to assist in conducting this important search and to help identify outstanding candidates. All inquiries, applications, and nominations should be directed to the search firm as indicated at the end of this document.

## PENN MEDICINE

### **The Raymond and Ruth Perelman School of Medicine + the University of Pennsylvania Health System:**

Penn Medicine's history of patient care began more than two centuries ago with the founding of the nation's first hospital, Pennsylvania Hospital, in 1751 and the nation's first medical school at the University of Pennsylvania in 1765. Penn Medicine has pioneered medical frontiers with innovators who have dedicated their lives to advancing medicine through excellence in education, research, and patient care.

**Patient Care:** Penn Medicine’s physicians, nurses, and staff provide exceptional, personalized care to patients with a wide range of medical conditions, including cancer, heart and lung diseases, neurological disorders, diseases of aging, and orthopaedic conditions, as well as care for newborns. Using state-of-the-art equipment and data science, Penn’s doctors and nurses work together to ensure that patients’ needs are addressed from multiple perspectives. Pharmacists, social workers, nutrition and rehabilitation professionals are all part of the care team.

Penn Medicine includes seven (7) acute-care hospitals and hundreds of outpatient centers throughout the region, as well as educational facilities at the Perelman School of Medicine.

1. The [Hospital of the University of Pennsylvania](#) is Penn Medicine’s largest hospital. HUP is a busy inpatient hub for cancer, neurosciences, cardiac care, and many other specialties. It is also the oldest university-owned teaching hospital in the country. The 5.2 million square-foot complex includes HUP Main, [HUP Cedar](#), and the [Clifton Center for Medical Breakthroughs](#) (CCMB). HUP Cedar provides emergency, inpatient and behavioral health services to the West and Southwest Philadelphia community. The CCMB at the Hospital of the University of Pennsylvania opened in 2021. The CCMB houses 504 private patient rooms and 47 operating rooms in a 1.5 million-square-foot, 17-story facility across from HUP Main and adjacent to PCAM. The \$1.6 billion facility was the largest capital project in Penn’s history and built to accommodate multidisciplinary teams and respond to fluctuating needs in medical care.
2. [Penn Presbyterian Medical Center](#) is consistently recognized as a center of excellence for cardiac care and ophthalmology. Its 1.35 million-square-foot campus includes the Musculoskeletal Center’s outpatient facility at Penn Medicine University City and the Pavilion for Advanced Care, home to Penn Medicine’s Level I Regional Resource Trauma Center.
3. [Pennsylvania Hospital](#) is the nation’s first hospital, cofounded by Benjamin Franklin in 1751. Today its outstanding clinical programs include the Spine Center, the Center for Transfusion-Free Medicine, maternity and newborn services, and behavioral health. It comprises a 1.1-million-square-foot campus, including Penn Medicine Washington Square, the hospital’s outpatient facility.
4. [Chester County Hospital](#) includes a hospital complex in West Chester that underwent a 250,000-square-foot expansion in 2020, specializing in heart and vascular care, cancer, orthopaedics, and women’s health among many other areas, with satellite locations in Exton, West Goshen, New Garden, Jennersville, Kennett Square, and West Grove.
5. [Lancaster General Health](#) includes Lancaster General Hospital, Women & Babies Hospital, and a network of nearly 100 outpatient facilities and physician practices in Lancaster, Chester, and Lebanon counties, for a total of more than 3 million square feet in facility space. It is home to Central Pennsylvania’s only Proton Therapy Center.



6. [Penn Medicine Princeton Health](#), which joined Penn Medicine in 2018, is among the most comprehensive healthcare systems in New Jersey, including facilities offering acute-care hospital services, behavioral healthcare, ambulatory surgery, and wellness services.
7. [Doylestown Health](#) represents a healthcare network that has delivered care to the community for 100 years, joined Penn Medicine in 2025. Its flagship facility, Doylestown Hospital, is located 30 miles north of Philadelphia, providing a wide range of inpatient and outpatient hospital care, including advanced surgical procedures, comprehensive specialty services, and wellness-education programs. The 245-bed community teaching hospital has a medical staff of 600 providers in more than 50 specialties.

Penn Medicine includes the following eight (8) specialized facilities:



1. The [Perelman Center for Advanced Medicine](#) is a state-of-the-art outpatient facility, with diagnostic and treatment facilities for cancer, neurological, and cardiac conditions, among other types of specialty care.
2. The [Roberts Proton Therapy Center](#) is the largest integrated radiation oncology center in the world. This most precise form of radiation uses beams of protons traveling at nearly the speed of light to eradicate tumors and spare healthy surrounding tissue.
3. The [Abramson Cancer Center](#) has over 305,000 outpatient visits with more than 9,000 participants in nearly 600 clinical trials. Since 1973, it has been designated a Comprehensive Cancer Center by the National Cancer Institute, one of 51 such centers in the nation.
4. The **Clinical Care Associates** and **Clinical Health Care Associates** are networks of primary and specialty care physicians, with more than 50 locations throughout the region.
5. [Outpatient sites](#) are located in Bucks County, Cherry Hill, Radnor, University City, Valley Forge, Washington Square, and Woodbury Heights, with a new facility in Montgomery County scheduled to open in 2027.
6. [Penn Medicine Rittenhouse](#) includes a rehabilitation facility and a long-term acute-care specialty hospital, in addition to outpatient radiology and primary care.
7. [Good Shepherd Penn Partners](#) is the post-acute care provider for Penn Medicine, providing inpatient and outpatient physical rehabilitation and specialized long-term acute care across the region.
8. [Penn Medicine at Home](#) offers a full range of home health services, including skilled nursing assistance, palliative and hospice care, infusion therapy and bereavement programs.

Easily accessible care is available throughout the region at Penn Medicine's multispecialty ambulatory locations. These centers offer convenient access to care across many disciplines, as well as laboratory testing and radiology services.

- Bucks County
- Radnor
- Valley Forge
- Cherry Hill
- Southern Chester County
- Washington Square
- Mount Laurel
- University City
- Woodbury Heights

**Education:** The [Perelman School of Medicine](#) — established in 1765 — is the nation’s first medical school. It is among the top medical schools in the country. Penn Medicine offers students and new physicians who train in their hospitals an innovative, comprehensive curriculum that prepares them to become leading physicians and scientists in a broad array of fields. The community of alumni numbers over 26,000 living and working across the globe.

**Research:** Penn Medicine is an internationally recognized leader for [discoveries](#) that advance science and patient care. Eighty-eight (88) Penn Medicine researchers are members of the National Academy of Medicine, one of the highest honors in medicine. Additionally, eleven (11) Nobel laureates with ties to the University of Pennsylvania have won the Nobel Prize in Physiology or Medicine, including winners in 2023 for their contribution in the development of mRNA vaccines. Additionally, since 2020, 4 faculty have received [Breakthrough Prizes](#) that honor transformative advances in science. The basic science and clinical research emerging from Penn Medicine’s laboratories and hospitals improve care for a wide range of medical conditions and provide the foundation for the next generation of therapies. The culture and campus of the University of Pennsylvania encourage close collaboration between basic scientists and clinicians, exemplified by the dozens of interdisciplinary clinical and research institutes, centers, and programs. These partnerships spur advances in disciplines from medical devices to nanotechnology. Penn Medicine’s research is distinctive because of the translational focus, including a large array of clinical trials and unusual success in generating FDA-approved treatments.

**Community Service:** Improving the health of people living throughout the [region](#) it serves is a cornerstone of Penn Medicine’s mission. Every day, physicians, nurses, students, and staff volunteer their time, skills, and knowledge to serve vulnerable populations. They operate free neighborhood clinics, help low-income residents manage medical appointments and wellness efforts, and provide education and mentorship to youth, among many other initiatives. These are supported in part by the Penn Medicine CAREs grants program, which provides funds for volunteer activities. Since CAREs was established in 2012, it has provided grants to over 900 service initiatives throughout the region, including programs in community centers, farmers’ markets, and places of worship.

**Global Engagement:** The [Center for Global Health](#) (CGH) synthesizes and expands Penn Medicine’s efforts to improve worldwide health equity. The Center’s vision for the future is to build a healthier world by training tomorrow’s leaders, addressing global health disparities, supporting regional centers of engagement in underserved locations, and uniting the Penn global health community. Among the many international projects, CGH includes three Centers of Engagement. The nineteen-year-old Guatemala-Penn Partnership focuses on public health, medical, as well as educational projects. The twenty-three-year-old Botswana-UPenn Partnership encompasses well-established programs in HIV/AIDS and other internal medicine subspecialties, with the education of local healthcare professionals. The six-year-old



Vingroup-Penn Alliance was established to improve healthcare and create new undergraduate and graduate medical training programs in Vietnam. The Penn community comes together to support humanitarian and medical relief efforts across the globe.

## THE UNIVERSITY OF PENNSYLVANIA

The University of Pennsylvania ranks among the world's leading universities. Founded by Benjamin Franklin and located in vibrant Philadelphia – the nation's sixth largest city and the second largest on the eastern seaboard – Penn has a storied, egalitarian, and pragmatic history. Beginning in the eighteenth century, the University was a global pioneer in undergraduate liberal arts education, and in supporting interconnections among scholarly and teaching programs in the arts and sciences and the professions. Penn developed some of the nation's earliest and finest graduate and professional schools – it was the first institution in the nation to be named a “University,” it is home to the North America's first medical school (Perelman School of Medicine), among the nation's first professorships in law, and the world's oldest collegiate school of business (Wharton) – and reputations have only improved with time.

Penn is home to a distinguished standing faculty of nearly 3,000 that is engaged in groundbreaking research and professional practice that crosses disciplinary and professional boundaries. Penn's 12 schools reside on a single, compact, urban campus within the University City District; spanning the arts, sciences, humanities, and professions; and display a special commitment to integrative, interdisciplinary scholarship and to energetic local and global engagement. Penn is strongly committed to recruiting the most talented students without regard to financial resources and has implemented an entirely need-based, all-grant financial aid program for undergraduates. Admissions are among the most competitive in the nation, with over 65,000 undergraduate applications annually and admission rates under five percent. The total research budget is \$2 billion annually, ranking in the top five for NIH funding in the nation in recent years. For more information, please visit: <https://www.upenn.edu/about>.

### Leadership

**Jonathan Epstein, MD**

**Dean of the Raymond and Ruth Perelman School of Medicine**

**Executive Vice President of the University of Pennsylvania for the Health System**

Dr. Epstein's journey is one of unwavering commitment to academic and medical advancement. A graduate of Harvard College and Harvard Medical School, he completed his residency and fellowship in Medicine and Cardiology at the Brigham and Women's Hospital before joining the University of Pennsylvania in 1996. Since then, he has both advanced his own research and held various leadership positions, serving as a crucial steward in the growth of Penn Medicine's research enterprise into the powerhouse of discovery it is today.

Prior to being named Dean/EVP, Dr. Epstein served as the Executive Vice Dean and Chief Scientific Officer for nearly a decade. He played a pivotal role in shaping Penn Medicine's trajectory as a national and international leader in discovery science and clinical research. He also served as Senior Vice President and Chief Scientific Officer for the health system beginning in February 2021. From 2006 to 2015, he served as chair of the Department of Cell and Developmental Biology and Scientific Director of the Penn Cardiovascular Institute. He played an instrumental role as a founding co-director of the Penn Institute for Regenerative Medicine in 2007.

Under Dr. Epstein's guidance, Penn Medicine has flourished as a hub of innovation and excellence in medical research. His contributions have earned him numerous accolades, including the Sir William Osler Young Investigator Award, the Outstanding Investigator Award from the American Federation for Medical Research, and the American College of Physicians Harriet P. Dustan Award for Science as Related to Medicine.

In the broader academic medical ecosystem, Dr. Epstein has served as a respected member of distinguished organizations, including the Philadelphia College of Physicians, the American Academy of Arts and Sciences, the American Association of Physicians, and the National Academy of Medicine. He also served as President of both the Interurban Clinical Club and the American Society for Clinical Investigation.

Dr. Epstein has directed a highly impactful research program throughout his tenure at Penn, and he is widely recognized for contributions to the understanding of congenital heart disease, heart failure, stem cell biology, and epigenetics. His most recent advances involve utilizing modified mRNA delivered with targeted lipid nanoparticles to engineer immune cells within the body to fight heart disease, cancer and other disorders.

### **Kate Griffo**

#### **Vice President for Development and Alumni Relations University of Pennsylvania**

Kate Griffo was named Vice President for Development and Alumni Relations on April 1, 2025. As Vice President, Griffo oversees the University's comprehensive fundraising and alumni engagement efforts, working closely with University leadership, deans, and development teams across the institution. She plays a key role in advancing major philanthropic initiatives and ensuring that the University's development efforts align with its highest priorities.

Griffo has been a dedicated leader at Penn for nearly two decades, serving most recently as Chief Advancement Officer for Penn Medicine Development and Alumni Relations. Throughout her tenure, she has played a pivotal role in partnering with donors on record-breaking philanthropic gifts for Penn Medicine, deepening donor and alumni engagement, and fostering a vibrant culture of volunteer leadership. Penn Medicine DAR has effectively propelled fundraising for clinical departments and biomedical research under her leadership, fostering record-breaking successes in fundraising campaigns.

Over the last 15 years and across the *Making History* and *Power of Penn* Campaigns, Kate led Penn Medicine DAR in raising more than \$4 billion, growing and strengthening Penn Medicine across metrics and measures. This includes Penn Medicine's physical footprint. Griffo has been instrumental in the expansion of Penn Medicine's campus through transformational naming opportunities including the Perelman School of Medicine, Abramson Cancer Center, Smilow Center for Translational Research, Jordan Medical Education Center, Roberts Center for Proton Therapy and, most recently, the Clifton Center for Medical Breakthroughs. Her focus on increasing financial aid has also advanced the University's commitment to opportunity and support for students and scholars.

Griffo's affinity with Penn extends beyond her professional leadership. She is also a Penn parent and is married to a proud alumnus (C'86), lending her invaluable perspective on the University's lifechanging impact on students, families, and alumni. Griffo earned her undergraduate degree from Dickinson College.

## ROLE OF THE CHIEF ADVANCEMENT OFFICER:

The Chief Advancement Officer (CAO) will shape organizational vision, direction, and culture and directly lead and manage a team of 145 FTEs within Penn Medicine Development and Alumni Relations (DAR). The CAO will develop an individual portfolio of key donors and prospects to engage and steward in conjunction with key chairs, faculty, and the Dean/EVP. The CAO will also lead strategy for engaging members of the Penn Medicine Board of Trustees as donors and advocates. The CAO will set the tone of partnership between Penn Medicine and University DAR fundraising teams and provide strategic counsel on a great variety of issues, facilitating outcomes and decisions, building and managing processes, and directing critical initiatives for the Penn Medicine DAR enterprise. The CAO will manage an annual budget of ~\$22 million and a fundraising enterprise that raised \$230 million in commitments in Fiscal Year 2024.

The next CAO will have a wide range of responsibilities, including:

- Direct all medical fundraising programs, including shared university-wide priorities and oversight of seven system hospitals.
- Guide, support, and leverage the Dean/EVP in his role as Penn Medicine's lead spokesperson, serving as advisor and strategist in cultivating highest-level donors, soliciting transformative gifts, and operationalizing bold new ideas.
- Provide senior counsel to the Penn Medicine and University leaders on issues related to the direction of the division and attainment of organization-wide fundraising goals.
- Lead and inspire Penn Medicine DAR staff by fostering a culture of teamwork, collaboration, innovation, excellence, and inclusivity. Lead by example regarding professionalism, creativity, entrepreneurship, appropriate risk-taking, and cross-organizational collaboration.



- Work closely with University DAR leaders, including the VP, to help facilitate organizational goals, increase organizational capacity, and strengthen the overall performance of the philanthropic enterprise across the entire University.
- Work with the Dean/EVP, CEO of UPHS, chairs, and other academic, clinical, and administrative leaders on fundraising priority building, planning, operations, staffing, and related activities.
- Work directly with donors, trustees, and volunteers on key opportunities including, but not limited to, gift commitments, board committees, and philanthropic guidance.
- Lead overall strategic planning efforts, including resource analysis and allocation and organizational development efforts.

## QUALIFICATIONS AND CHARACTERISTICS

Significant and impactful leadership experience in, and knowledge of, all major functions of development and alumni and grateful patient engagement is required, as well as significant experience working in a complex matrixed environment in a research university or academic medical center.

Additional qualifications and experience include:

- A track record of success leading programs across grateful patient fundraising and fundraising for basic/translational science and research.
- A record of achievement in building and retaining high-performing teams of talented individuals.
- Campaign planning and implementation experience, preferably within a research environment.
- Significant gift solicitation and negotiation experience at the eight- and nine-figure level. Preferred experience with transformational gifts (\$50 million+).
- Experience working with senior leaders in setting aspiration goals, building key projects to meet those goals, and developing philanthropic opportunities.
- Experience in leading change in complex organizations; experience leading through influence.
- Proven collaboration and partnership skills to accomplish shared goals involving colleagues and other senior leaders.
- Evidence of creative, strategic, energetic, collaborative, and inspired leadership within a complex institutional environment.
- Significant experience overseeing substantial budgets and operations and directing/managing multiple complex projects concurrently.
- Bachelor's degree required; advanced degree preferred.

## APPLICATIONS, INQUIRIES, AND NOMINATIONS

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and resumes should be sent via the Isaacson, Miller [website](#).

Jack Gorman, Partner  
Grace Zakim, Managing Associate  
Lisa Clayton, Senior Search Coordinator  
Isaacson, Miller

*Penn Medicine is an Equal Opportunity and Affirmative Action employer. Candidates are considered for employment without regard to race, ethnicity, color, sex, sexual orientation, gender identity, religion, national origin, ancestry, age, disability, marital status, familial status, genetic information, domestic or sexual violence victim status, citizenship status, military status, status as a protected veteran, or any other status protected by applicable law.*

