



MOUNT ZION HEALTH FUND

Resources for a Healthy Community

COMMUNITY UPDATE : FALL 2003

Grants to Local Programs Increase Access

M to Care

Many of us lament our faltering health care system, but few envision they can do something to make a difference. This past year MZHF made grants to several small non-profit organizations that are making a difference by providing free or low-cost health care to individuals and families in need



Women's Community Clinic volunteers run a lab test for a client

of services. Grants were made to: **Women's Community Clinic** to expand their Street Outreach Project which provides information, health and wellness supplies to women living and working on the streets in San Francisco; **Jewish Community Free Clinic of Sonoma County** to support their planned expansion and increased services for low-income and uninsured individuals, specifically children; and **Operation Access** to recruit new volunteers, hospitals and... *continued on page 2*



Community Lecture Series Inaugurates "New" Herbst Hall

Through the efforts of Dr. Jeffrey Pearl, Associate Dean, UCSF Medical Center at Mount Zion, one of the central learning facilities at the Mount Zion campus has recently undergone a complete renovation. Originally funded with a grant from the Herbst Foundation, Herbst Hall has been home to countless lectures and educational programs over the years. Although still in regular use, the lecture hall's technology had not been upgraded to keep pace with the times. Medical staff and students alike will benefit from its refurbishing which provided state-of-the-art teaching technology as well as new seating, lighting and aesthetic elements.

The inaugural use for the "new" Herbst Hall will be a series of lectures under the direction of the Osher Lifelong Learning Institute (OLLI). With a major start-up grant from the Bernard Osher Foundation, and additional funding from Mount Zion Health Fund, UCSF has developed the OLLI, whose mission is to encourage

older Bay Area citizens to adopt a lifestyle of lifelong intellectual exploration using topics in health science and health care. OLLI is designed for both working and retired people age 50 and over, a population that is expected to double by 2020 in the Bay Area.

Drawing on the expertise of UCSF faculty, the curricular format will include a series of six-week courses which start in early October and are offered throughout the year. The series begins with a course focused on forensic medicine. Tuition for each course is \$75.00, and scholarships are available for low-income participants.

For more information please call Sandy Gettys, program coordinator, at 415-476-3438, visit OLLI's website: <http://lifelonglearning.ucsf.edu>, or email lifelonglearning@pubaff.ucsf.edu.

Plans are underway to offer current film showings at Herbst Hall. These will be open to the community. Information will be available in the late fall. □

NEW DIRECTOR AND OFFICERS ELECTED

At its annual meeting last June, the MZHF Board elected three new officers and one new director. David Agger, who has served on the Board for three years, was elected President. Sari Swig was named Vice President, Alan Rothenberg, Treasurer and Arlene Singer continues as Secretary. *continued on back page*



MZHF Board officers at June's annual meeting: (l to r) Alan Rothenberg, Treasurer; David Agger, President; Arlene Singer, Secretary; Sari Swig, Vice President.

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Current Economy Prompts Meeting of Health Grantmakers

In early summer, Mount Zion Health Fund CEO, Ann Lazarus, met with colleagues from the Bay Area health funding community to compare notes on the trends and challenges of making health grants in today's economy. Below, Ann shares highlights from the meeting and how MZHF is impacted by current trends.

"Our meeting touched on many topics, including the impact of the current economic environment on grantees; our responses to changes in the needs of our grantees; recent shifts in funding priorities as well as strategies, and new opportunities for health funders to work together in their grantmaking.

Several common themes emerged. One is the need to make smaller grants, approved more quickly, when key health safety net organizations require immediate help with core operating expenses. Additionally, we discussed the priority of ensuring that health care is accessible for those most vulnerable in our community, and the need to support projects designed to enroll and retain individuals in health insurance plans.

MZHF has been affected by the current economic climate, right along with these other major health funders. Less money to grant, due to reduced income from our endowment, has meant greater scrutiny in recent grant-making cycles. Our Board members want to ensure the closest fit between our organization's mission and the applicant. In some cases, we have also reduced the size of our grants in order to assist more organizations."

In addition to MZHF, program officers

and directors at the meeting included representatives from The California Endowment, California Wellness Foundation, the Richard and Rhoda Goldman Fund, The Health Trust, John Muir/Mt. Diablo Community Health Fund, Lucile Packard Foundation for Children's Health, McKesson Foundation, Peninsula Community Foundation, the San Francisco Foundation, Y&H Soda Foundation, and the United Way of the Bay Area. They will meet again in September for a dialogue on relevant state and local ballot measures. □

"Access to Care" continued from front page



Robin Lowitz, MD, volunteer family physician and founder of the Jewish Community Free Clinic of Sonoma County, checks a young patient at the recent opening of their new Pediatric Clinic.

clinics as partners in their work providing free surgeries to the uninsured.

Each of these programs has a small staff working in tandem with a large group of committed professional and lay volunteers. Mount Zion Health Fund is pleased to assist these dedicated health care providers in their efforts to increase access to care for underserved community members. □

BEHIND THE SCIENCE:

Profile of a Young Investigator



Born in San Mateo, and growing up on the Peninsula, James L. Rubenstein, MD, PhD, was never too

far from UCSF, where today he conducts research in the neurologic complications of cancer and treating tumors of the brain. James is one of several young cancer researchers who have received a two-year Clinical Investigator Research Program (CIRP) fellowship grant funded by Mount Zion Health Fund, designed to provide research support at a project's inception. The purpose of these grants is to sustain promising investigations before the data is acquired that is essential for obtaining extramural funding.

James notes that for someone with his research interests, the draw to UCSF was strong. "UCSF offered me an arena in which pivotal discoveries on the subjects of oncogenes, cell cycle regulation, and basic cell biology were being realized in parallel with incipient plans for a Comprehensive Cancer Center. It also offered an incredibly rich clinical training program, and an outstanding tradition and program in Neuro-Oncology."

Arriving in 1995 as a clinical fellow, he is now Assistant Professor, Hematology/Oncology and his focus is on central nervous system lymphomas. James comments, "This is a challenging disease to treat, but it can also be extraordinarily gratifying. When I began my research in this field there was very limited biological... *continued on next page*

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What's Happening at Mount Zion:

THE
BIG
PICTURE

There have been significant changes at Mount Zion Hospital over the past several years, and more are on the horizon. Mount Zion Health Fund recently interviewed Dr. Jeffrey Pearl, Associate Dean, UCSF Medical Center at Mount Zion, to get a perspective on the current plans and the challenges ahead.

MZHF: You've been associated with Mount Zion for 25 years, as surgeon, Chief of Staff, and now Associate Dean. Please share with us your vision of Mount Zion for the next few years.

Dr. Pearl: Although Mount Zion no longer has the inpatient focus for which it was known historically, it has evolved into a significant comprehensive outpatient center with a focus on cancer, women's health, and integrative medicine. Plans for an increasing range of services on an inpatient basis, particularly for

cancer patients, makes these next few years exciting ones for Mount Zion's growth and service to the community.

MZHF: We know that philanthropic support is needed to fully realize this vision, and MZHF is pleased to be a funding partner. Would you explain the peer review process that was initiated to evaluate grant requests and make funding recommendations to MZHF?

Dr. Pearl: A grant request system has been put in place that allows proposals to be made by anyone on campus, four times per year. Since this process began three years ago, we have evaluated more than 120 proposals. These requests must meet certain criteria, including demonstrating benefits to the community and to the Mount Zion campus. They are judged by a peer group that I put together – tough critics who have turned down as many proposals as they have approved. Their selections are presented to the MZHF Board of Directors where they are again examined for their consistency with the mission and funding criteria for MZHF support.

MZHF: What are three things you are most excited about at the Mount

Zion campus today or in its future?

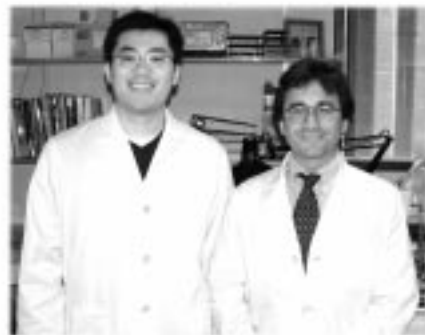
Dr. Pearl: 1) UCSF's commitment to open 50 inpatient beds, seven Intensive Care Unit beds, and eight operating rooms for the Comprehensive Cancer Center surgery program, along with the migration of 15 UCSF surgeons to the Mount Zion campus. 2) The renovation of Herbst Hall and the new programs to be offered there, such as the Osher Lifelong Learning Institute seminars (note: see first page story), and the once-a-month showing of current films which will be open to the community, including our neighbors, the residents of Rhoda Goldman Plaza. 3) UCSF staff moving to Mount Zion campus and seeing what a wonderful place this is. In addition to these three, I would also mention our beautifully designed Meditation Room, which continues to be well-utilized by patients, staff and visitors alike.

MZHF: What would you tell a patient whose doctor has referred him or her to Mount Zion?

Dr. Pearl: This is a world class hospital that also has a heart. As former UCSF Medical School Dean Haile Debas was always fond of saying, "Mount Zion is where the nurses tuck you in." □

"Behind the Science" continued from page 2

information regarding this disease and therapeutic options for patients diagnosed with this condition remain limited. This was a natural area to develop because of my experience in both Hematology/Oncology and in Neuro-Oncology. In my work, I hope to begin to understand the basis for the strikingly different outcomes that we encounter in the clinic: why some patients exhibit excellent responses to therapy and why other patients fail to respond to treatment."



James L. Rubenstein, M.D., Ph.D. (right) and research associate, Arthur Shen, take a break from their lab work focused on diagnosis and treatment of central nervous system lymphomas

In the years ahead, James envisions a thriving research program which investigates the biological properties of tumors which involve the brain, and advances our current means of diagnosis, treatment, and monitoring response to treatment. In the scarce free time outside his research work, James enjoys listening to music, playing sports and living in San Francisco with his wife, Nicky. He adds, "I would like to thank Mount Zion Health Fund for their pivotal early support of my work." □

Tradition of Giving

The following list includes memorial and tribute contributions received by Mount Zion Health Fund from January 1 through June 30, 2003. These commemorative gifts continue a legacy of giving which dates back to the origins of Mount Zion Hospital in 1887. Mount Zion Health Fund is honored to carry on this tradition, ensuring that these gifts are used to improve the health of our community. We thank our friends and supporters for their generosity.

Art for Recovery

Ms. Lisa E. Anderson
 Ms. Lorraine M. Anderson
 Brandeis Hillel Day School
 Student Council (San Rafael)
 Mr. and Mrs. Gary Cellini
 Mrs. Jane Garypie
 Dr. Amnon Goodman
 and Dr. Abigail Caplin
 ALICE@97.3
 (Infinity Broadcasting Corporation)
 Johnson & Johnson
 KKSF FM 103.7
 Ms. Anne M. Marino
 Ms. Caroline A. Priestley
 Ms. Mary Rooney and Mr. Dan Noreen
 Ms. Kathryn Roth and Mr. Bill Kennedy
 Mr. and Mrs. Alan Sigel
 Theta Delta Xi Gamma Chapter
 Mr. and Mrs. Murry Waldman

Cherin Diabetes Education Fund

Mr. and Mrs. Rudolf Ameling
 Mrs. Inge Berliner
 Mr. and Mrs. Allan Byer
 Mr. and Mrs. James Candler
 Miss Lurline Drake
 Mr. and Mrs. Hy Foreman
 Mr. and Mrs. Sidney Glickfeld
 Mrs. Rose Goldman
 Mr. and Mrs. John Gurney
 Dr. Arlene Krouzian
 Mr. and Mrs. Maxwell Lapkin
 Mr. and Mrs. Saul Madfes
 Mr. and Mrs. John O'Connell
 Mr. Dominic Oliveri
 Mr. and Mrs. Howard Oser
 Mr. and Mrs. Byron Samuel
 Ms. Joan Spaulding
 Naomi Talkov and Family
 Allen Weiner and Family

**Harold Dobbs
 Cancer Research Fund**

Mrs. Annette Dobbs
 Mr. and Mrs. Greg Dobbs

Rhoda Goldman Cancer Care Fund

Ms. Esther Gray

**Kerner Cancer Research
 and Education Fund**

Mr. and Mrs. William M. Brinton

Mothers' Living Stories Project

Eva Chernov Lokey

**Mount Zion
 Medical Staff Library Fund**

Mrs. Maria Ury
 Dr. and Mrs. Vadim Kvitash

**Mount Zion Health Fund
 Unrestricted Fund**

Ms. Mabel Moses

Dr. Milton Pearl Fund

Mrs. Barbara L. Harris
 Mrs. Helen L. Pearl

**Dr. Ernest Rosenbaum
 Cancer Research Fund**

Mr. Lowell Adelson
 Ms. Leslie Anixter
 Mrs. Rosalie Anixter
 Ms. Roma M. Auerback
 Ms. Joyce Dinslage
 Mr. and Mrs. Dunbar Averell
 Mrs. Chrys A. Bicchichi
 Mrs. Samuel Blatteis
 Mr. and Mrs. Joel Bennett
 Mrs. Fay H. Benson
 Mrs. Inge Berliner
 Mrs. Sally Berman
 Mrs. Leatrice Bohne
 Drs. Chan, Kwan, and
 Chan - Albuquerque
 Mr. and Mrs. Tony Chan
 Barbara Donaldson and Family
 Mr. and Mrs. Byron Eisenberg
 Mr. Ben Eisler
 Elkco Optical
 Mr. Arthur Engelbrecht
 Ms. Helen M. Epstein
 Mr. and Mrs. Hy Foreman
 Ms. Elizabeth Francisco
 Mr. and Mrs. Ben Ganapol
 Mrs. Daniel T. Goldberg
 Ms. Sylvia M. Goldblatt
 Mr. and Mrs. John Gonella
 Ms. Doris Grasshoff
 Mr. Alvin Guthertz
 Mr. and Mrs. George Hochman
 Ms. Ruth Horenstein
 Mr. and Mrs. Warren Hutchins
 Mr. and Mrs. John Koerner
 Mr. and Mrs. Murray Kotlove
 Mrs. Inge Lehmann
 Mr. and Mrs. Edward Lelyveld
 Ms. Irma S. Levin
 Mrs. Marian Levy
 Ms. Frederica L. Lewis

Mrs. Robert Lilienthal
 Mrs. Harriet Lloyd
 Makovsky & Company Inc.
 Ms. Carol Mandour
 Ms. Esther Mann
 Mrs. June Meibergen
 Mr. and Mrs. Warren S. Michael
 Mr. and Mrs. Burton Miller
 Mr. and Mrs. Frank Navarra
 Mr. and Mrs. Howard Oser
 Mr. Stanley C. Pearle
 Mr. and Mrs. Gene Phelps
 Mrs. Maxine Pollak
 Mr. and Mrs. Robert Rantz
 Mrs. Shirley Rich
 Ms. Wanda P. Ross
 Mrs. Nadine Rushakoff
 Ms. Vicki Rushakoff
 and Mr. Michael Weiner
 Mr. and Mrs. Jerry Samuel
 San Mateo Sheriff's Emergency Services
 Mr. and Mrs. Donald Schine
 Mrs. June Shane
 Dr. and Mrs. Marcus Shimoff
 Mr. and Mrs. Alan Sigel
 Mr. and Mrs. Marvin Silver and Family
 Dr. Raymond Sommer
 Mrs. Marian Soss
 Ms. Beryl Sperling
 Dr. and Mrs. Bruce Stamper
 Mr. Irving C. Sugarman
 Sunset Glass, Inc.
 Veyes Opticians
 Mr. Rose Warshauer
 Mr. and Mrs. David Weill
 Mrs. Betty J. Weiss
 Mr. and Mrs. Phillip Woolfe
 Mrs. Jean Zemel
 Mr. and Mrs. Edward Zigman

Dr. Herman H. Uhley Research Fund

Mr. Donald L. Phillips

**Zena Gross Greenstrand
 Memorial Fund**

Ms. Noreen Anosov
 Mr. and Mrs. Herbert Gross
 Mr. and Mrs. David Zeff



Please visit our website:
www.mzhf.org
 and learn more about
 MZHF's funding priorities,
 guidelines and
 application procedures,
 listings of grants recently
 approved, and other
 helpful information.

2002-2003 TRUST & SPECIAL FUNDS SUMMARY OF GRANTS

∞ Patient Care

S. F. General Hospital Foundation	To support the renovation of the women's imaging center	\$246,000
UCSF at Mount Zion Women's Health	For the reconstruction of the Pavilion Building to house women's health	116,000
	To develop a program for the Center for Pelvic Floor Disorders	35,000
UCSF at Mount Zion Center for Inflammatory Bowel Disease (IBD)	For continued support for this multidisciplinary care and research program	85,000
UCSF Comprehensive Cancer Center	For programming at the Cancer Resource Center	50,000
	For outreach, education, and genetic testing for high risk Russian émigrés	10,000
Women's Community Clinic	Two-year grant to expand the Street Outreach Project	40,000
UCSF at Mount Zion Center on Aging	To extend the Housecalls program providing home care to frail elders	35,000
Huckleberry Youth Programs	To continue their planning efforts for the Cole Street Clinic	35,000
UCSF at Mount Zion	For inauguration of the Osher Lifelong Learning Institute at Herbst Hall	25,000
UCSF at Mount Zion	To develop an interactive CD for patient treatment information	21,000
Jewish Community Free Clinic	For expansion of services in Sonoma County to include a pediatric clinic	15,000
UCSF at Mount Zion	To purchase medical kits for the school sports injury outreach program	15,000
Operation Access	To expand availability of surgical care for the uninsured	10,000

∞ Research

UCSF Comprehensive Cancer Center	For a two-year research project in colorectal cancer	100,000
	For a two-year research project in pancreatic cancer	100,000
	For research in mesothelioma	25,000
Osher Center for Integrative Medicine	To undertake an ethnographic pilot study of integrative medicine	50,000
	To undertake a breath therapy pilot study	48,000

This partial listing includes awards approved by the Directors during Fiscal Year 2002-03 from Board discretionary and other funds, as well as selected significant awards from donor-advised funds, and does not include payments on multi-year capital pledges.

2002-2003 SUMMARY FINANCIAL DATA

Support & Revenue

Contributions	\$1,347,000
Interest & Dividend Income	1,266,000
Other Income	207,000
	<u>\$2,820,000</u>

Assets

Cash	\$ 14,000
Investments, at fair value	45,256,000
Other Assets	260,000
Total Assets	<u>\$ 45,530,000</u>

Expenditures

Grants By Fund Category:	
Patient Care	\$ 421,000
Education	82,000
Research	974,000
Advised	1,894,000
Unrestricted	221,000
Custodial & Investment Related	285,000
Grants Management	232,000
	<u>\$4,109,000</u>

Liabilities & Net Assets

Short-term Liabilities	\$ 22,000
Restricted Net Assets:	
Patient Care	10,071,000
Education	2,051,000
Research	9,836,000
Advised	11,139,000
Total Restricted Net Assets	33,097,000
Unrestricted Net Assets	12,411,000
Total Liabilities & Net Assets	<u>\$45,530,000</u>

TRUST & SPECIAL FUNDS

PATIENT CARE FUNDS

Alice and Sidney Schwartz Patient Fund
Berthold and Belle Guggenime Fund
Blanche B. Goldman Newborn Prenatal Care Fund
Cardiovascular Patient and Family Care Fund
Children's Caring Fund
Claire Zellerbach Saroni Memorial Tumor Institute Fund
Clinic Fund
Dorothy and Edwyn Garfield Fund
Dr. Jacob Abouav Cardiac Fund
Edgar M. Kahn Memorial Fund
Gustav and Rose Schmelzer Outpatient Clinic Fund
Harriet Ornstein Memorial Fund
Harry and Betty Curzon Endowment Fund
Irene B. Dernham Fund
Irma H. Reyman Memorial Fund
Julian Meyer Cardiovascular Fund
Rhoda Goldman Cancer Care Fund
Zena Gross Greenstrand Memorial Fund

EDUCATION FUNDS

Alice and Samuel Lilienthal Memorial Fund
Blumberg Loan Fund
Dr. Julius Rosenstirn Scholarship Fund
Jacob Smith Surgical Lab Fund
Louis and Amelia Bloch Memorial Fund
Mabel E. Brush Endowment Fund

Milton Meyer Teaching Fund
Patricia Brown Memorial Fund
Rhoda and Richard Goldman Fund
Schwartz Education and Travel Fund

RESEARCH FUNDS

Frederick J. Hellman Fund
General Research Fund
Gilda H. and Irving L. Mayer Fund
Gladys Bass Fund for Biomedical Research
Harold Brunn Institute Endowment Fund
Herbert L. Cook Memorial Fund
Loraine M. Newman Research Fund
Lucie Stern Trust Fund
Pearl B. Jacobs Trust Fund
Rhoda Goldman Cancer Research Fund

ADVISED FUNDS

Art For Recovery Fund
Cutaneous Oncology Fund
Cherin Diabetes Education Fund
Dan Geller Memorial Research Fund
Department of Medicine Fund
Diabetes Research Fund
Dr. Alan B. Glassberg Cancer Fund
Dr. Alan Rosenberg Fund
Dr. Allan Teranishi Fellowship Fund
Dr. Ernest Rosenbaum Cancer Research Fund
Dr. Harris M. Fishbon Fund
Dr. Harvey Salans Patient Care Fund
Dr. Herman H. Uhley Research Fund
Dr. Jay Gershow Cancer Research Fund
Dr. Lawrence Margolis Radiation Oncology Fund
Dr. Leonard D. Rosenman Fund

Dr. Milton Pearl Fund
Dr. Rubin L. Gold Memorial Fund
Dr. Weinstein Education and Long-Term Care Fund
Gerson R. Biskind Pathology Research Lab Fund
Gospe, Herzog, Weil, and Domush Fund
Harold Dobbs Cancer Research Fund
James K. Edmund Memorial Fund
Janet S. Landfear Memorial Fund
Judith Swig Parker Memorial Fund
Julian Davis Lectureship Fund
Julius R. Krevans Fund
Katherine H. Bercovici Memorial Fund
Kerner Cancer Research and Education Fund
Kidney Dialysis Fund
Marlene Spitz Cancer Fund
May and Ben Shane Fund
Medical Staff Library Fund
Melanoma Center Fund
Munsella and Goody Gensler Memorial Fund
Richard F. and Maria B. Ury Endowment Fund
Robert H. F. and Barbara H. Smith Fund
Ruth and Ben Colloff Tumor Research Fund
Stephen and Lillian Stuart Fund

BOARD DISCRETIONARY

Mae Swig Memorial Fund
Mark Berke Memorial Fund
Martin Diamond Fund
Melville Marx Memorial Fund
MZHF Unrestricted Fund

MOUNT ZION HEALTH FUND BOARD OF DIRECTORS 2003-04

Officers: David Agger *President*
Sari Swig *Vice President*
Arlene Singer *Secretary*
Alan Rothenberg *Treasurer*

Directors: Harvey Brody, D.D.S.
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Ann Lazarus
Susan Lowenberg
David H. Melnick
Robert T. Mendle, M.D.
Jeffrey Pearl, M.D.
Didier Perez
Robert Sockolov
Bruce Spaulding
Joelle Steefel
Margaret Tempero, M.D.
Joan Trauner, Ph.D.
Harold Zlot

"New Officers" continued from front page

Didier Perez was elected to the Board for a three-year term. Mr. Perez has been serving as a member of the MZHF Investment Committee. He is responsible for Corporate and Business Development at Investigen, a molecular diagnostic company located in the East Bay. He is also Managing Partner of Inovation Ventures LLC, a venture capital firm specializing in start-up and early stage companies.

We are also pleased to welcome Robert Sockolov, the new Board Chair for the Institute on Aging, who replaces Amy Zellerbach.

Retiring from the Board in June



Former MZHF Board President Stephen Dobbs (left) converses with new director Didier Perez

were Richard Baum, John Blumlein, Ernest J. Ring, M.D. and Paul Siegel. Each gave many years of service and we greatly appreciate the time and energy they devoted as directors. □