Grants to Local Programs Increase Access 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 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. continued on page 2

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
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

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.
What’s Happening at Mount Zion:

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.”

“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.”
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. Almon Goodman  
and Dr. Abigail Caplin  
ALICE97.3 (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 Gluckfeld  
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. Dominick 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 Amixter  
Mrs. Rosalie Amixter  
Ms. Roma M. Auerback  
Ms. Joyce Dinslage  
Mr. and Mrs. Dunbar Averell  
Mrs. Chrys A. Bicicchi  
Mrs. Samuel Blatteis  
Mr. and Mrs. Joel Bennett  
Mrs. Fay H. Benson  
Mrs. Inge Berliner  
Mrs. Sally Berman  
Mrs. Leatrice Bohne  
Mrs. Chan, Kwan, and Chan - Albuquerque  
Mr. and Mrs. Tony Chan  
Barbara Donaldson and Family  
Mr. and Mrs. Byron Eisenberg  
Mr. Ben Eisler  
Elko 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 Kolove  
Mrs. Inge Lehmann  
Mr. and Mrs. Edward Lelyveld  
Ms. Irma S. Levin  
Mrs. Marian Levy  
Ms. Frederica L. Lewis  

**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  
MZHFs 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
Total $2,820,000

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
Total $4,109,000

Assets
Cash $ 14,000
Investments, at fair value 45,256,000
Other Assets 260,000
Total Assets $45,530,000

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 $45,530,000
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 Innovation 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 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.