



Collins Medical Trust

Medical Research and Education in Oregon

2008 Annual Report

Founded by Truman W. Collins, Sr. in 1956

Collins Medical Trust

2008 Annual Report

Purpose and History

“The principal and income of the trust fund shall be used (a) to aid, further, promote, develop, encourage and sponsor research, experiment and work in the cause, cure and treatment of human diseases or in any field of medical research, and (b) to aid, further and promote medical education.”

The Collins Medical Trust was founded by Truman Collins Sr. in the fall of 1956. He was interested in the medical field and wanted to set up a trust that would contribute to medical research and education taking place in Oregon. Contributions were made to the trust over the next ten years or so, and its assets have grown significantly since that time, largely due to the wise investment decisions of the financial adviser, Jim Miller, over the first forty years of the Trust’s existence.

Because the Trust makes relatively small grants—typically in the \$15,000 to \$30,000 range—our focus for research grants has primarily been seed funding to projects that will go on to request from the NIH or other large funders in a later stage.

Since its inception, the Collins Medical Trust has made grants totaling about \$6.4 million.

Trustees and Staff

Nancy Helseth: Administrator (1993 – present)
 Truman Collins Jr.: Trustee (1990 – present)
 Dr. Elizabeth Eckstrom: Trustee (2003 – present)
 Dr. Walter McDonald: Trustee (2005 – present)
 Timothy Bishop: Treasurer (1990 – present)

Financial Statements (Fiscal year ending September 30, 2008)

Assets and Liabilities			Revenue and Expenses		
Assets:	2008	2007	Income:	2008	2007
Cash	\$230,420	\$357,396	Income (interest & dividends)	\$287,534	\$260,120
Stocks	\$6,873,378	\$8,152,917	Realized gains	\$15,961	(\$15,472)
Bonds	\$69,000	\$137,625	Unrealized gains	(\$1,341,914)	\$777,015
Total assets	\$7,172,798	\$8,647,938	Total income	(\$1,038,419)	\$1,021,663
Liabilities	(\$34,617)	(\$42,129)	Taxes & investment expense	(\$7,400)	(\$6,722)
Net Assets	\$7,138,181	\$8,605,809	Net Investment Income	(\$1,045,819)	\$1,014,941
			Grants - net	(\$421,809)	(\$442,138)
			Net revenue	(\$1,467,628)	\$572,803

2008 Grants (October 1, 2007 – September 30, 2008)

Research

- \$20,000 — Portland VA Research Foundation, Inc. — Sonemany Salinthon, Ph.D.
Investigating the Effects of Lipoic Acid on NK cells: A Novel Treatment Strategy for MS
- \$29,290 — OHSU Foundation — Philip Stork, M.D.
A New Model for Studying Gene Expression Patterns in Response to Altered Hemodynamic Conditions in the Developing Heart
- \$29,750 — OHSU Foundation — Malcolm Low, Ph.D.
The Role of Proopiomelanocortin Neurons in Feeding and Obesity: An anatomical and Behavioral Analysis
- \$30,000 — OHSU Foundation — Sarah Byers, Ph.D.
Phosphorylation Sites that Regulate c-Myc's Proliferative and Apoptotic Functions
- \$25,993 — OHSU Foundation — Brian Rogers, M.D.
Early Detection of Neurological Disorders for Early Intervention
- \$30,000 — Portland State University — Sean Kohles
Cell Biomechanics and the Study of Disease States
- \$30,000 — OHSU Foundation — Peggy Su Choo Chang, M.D.
Altered c-Myc Phosphorylation Sites at Threonine 58 and Serine 62 in the Generation of Pediatric Brain Tumors
- \$30,000 — OHSU Foundation — Justine R. Smith, MBBS, Ph.D.
Migration of Th17 Cells Into the Human Eye
- \$29,984 — OHSU Foundation — Anna Kuang, M.D.
The Role of the Mammalian Target of Rapamycin in Keloid and Hypertrophic Scars
- \$25,000 — OHSU Foundation — Michiko M. Nakano, Ph.D.
Antimicrobial Activity of C9ASA against Methicillin-Resistant Staphylococcus Aureus
- \$30,000 — OHSU Foundation — Owen McCarty, Ph.D.
Characterization of Protein C as a Novel Prohemostatic Agent
- \$29,175 — OHSU Foundation — Bin, Lu, Ph.D.
Stem/Progenitor Cell Therapy for Macular Dystrophy

Total Research: \$339,192 (80%)

Education

\$67,000 — Linfield School of Nursing
Paquet Scholarship Fund, Half for Endowment and Half for Current Scholarships.

\$20,000 — Western Oregon University
Simulation Lab Equipment for their Nursing Program.

Total Education: \$87,000 (20%)

Total Grants approved in 2008: \$426,192

Highlights from Prior Grants

Improving Care of the Dying: Overcoming Barriers and Advancing Gains in End of Life Care — Susan W. Tolle, M.D. — OHSU

In 1998, Dr. Susan Tolle and her colleagues had just published a manuscript demonstrating a new way to assure that nursing home resident's wishes to have or to limit treatment would be respected when they move from their nursing home to the hospital. For one year, they followed frail residents at eight nursing homes using the bright pink Physician Orders for Life Sustaining Treatment (POLST) form to document patient preferences for or against life-sustaining treatment. Of the 180 nursing home residents who wanted the focus of their care to be on their comfort, not one person's wishes were ignored, and none received CPR or admission to intensive care against their wishes. A few Oregon nursing homes were using the POLST program at the time. Educational tools needed to be shared with nursing home leaders throughout Oregon. The Collins Medical Trust awarded the OHSU Center for Ethics in Health Care a grant of \$27,080 to conduct a series of educational conferences throughout the state. A primary goal was to teach health care leaders in nursing homes how to use the POLST Program. With skills learned at these conferences, these leaders became change agents, returning to their facilities to work with others to guide the development of educational programs and policy change that supported the use of the POLST form.

A decade later, the impact of this initial grant has been profound. The Robert Wood Johnson, Nathan Cummings and Kinsman Foundations have contributed over two million dollars toward educational programs for health care professionals in nursing homes, hospitals and hospice programs throughout Oregon. The National Institutes of Health (NIH) has awarded an additional \$1.4 million for a multi-state POLST research grant. The POLST program has been widely adopted throughout Oregon and beyond. Currently all Oregon Medicare certified hospices use the POLST program, and it is used in all but seven Oregon nursing homes. As of August 2008, 24 states are developing or have implemented a POLST Program modeled after the program developed in Oregon. (See www.polst.org) As a result, hundreds of thousands of Americans are more likely to have their preferences for care in the final stages of life honored.

Apprentices in Science and Engineering — Saturday Academy

In 2003 the Collins Medical Trust awarded Saturday Academy a three-year \$17,000 grant to fund some of our state's best and brightest high-schoolers in their Apprentices in Science and Engineering (ASE)

Program. ASE encourages young people to pursue education and careers in fields that are critical to our community's and our nation's future by placing them in apprenticeship positions with community experts and professionals.

Over the course of the three-year grant the nine students worked directly with Dr. David Sahn at Oregon Health & Science University. The apprentices used ultrasound technologies to image and quantify cardiac function. The focus of research was to develop creative and non-invasive methods of exploring cardiac anatomy and physiology. They used a pig heart imbedded with specially designed monitoring devices to monitor heart muscle performance. Data was then recorded and analyzed to create a baseline for comparison to the Torrent-Guasp model of heart structure and cardiac output, an alternative concept of the heart muscle functions to pump blood. Although the work of Dr. Sahn is ongoing and evolving, his lab has used the students work as pilot data in an effort to secure funding for developing advanced methods for understanding cardiac mechanics.

Today the apprentices are attending some of our country's finest colleges including Stanford, Norte Dame and New York University. Since their apprenticeships some of the students have also worked at OHSU and the National Heart, Blood and Lung Institute and done presentations for the American College of Cardiology.

The Relationship between Autism and Cholesterol Synthesis — Robert Steiner, M.D. and Darryn Sikora, Ph.D. — OHSU Children's Development and Rehabilitation Center

In June of 2005, the Collins Medical Trust made a \$30,000 grant to this team. These OHSU specialists, clinicians and scientists are making significant advances in understanding how abnormalities in the brain's ability to synthesize cholesterol might be directly linked to autism. The Collins Medical Trust provided funding to Robert Steiner, M.D. and Darryn Sikora, Ph.D., in support of a study titled, *The Relationship between Autism and Cholesterol Synthesis*. The grant supported the critical early phases of groundbreaking research, which included extensive genetic and biochemical analyses of more than 60 patients. Data collected from these patients is now beginning to shed light on the causes of some cases of autism. As a result of this success, Cure Autism Now (CAN) provided significant funding to carry the research further.

In addition, the Northwest Health Foundation awarded a prestigious Hatfield Fellowship to Trevor Hall, Ph.D., a young OHSU autism researcher on the team. Building on the original project supported by the Collins Medical Trust, Dr. Hall is conducting extensive neuropsychological testing of children with autism to examine brain functioning and behavior to better understand the potential role of cholesterol synthesis in autism. Using the latest genomic DNA micro-array analysis technology, Dr. Hall and the OHSU research team are now able to study about 90 different genes to examine subtle differences in lipid and cholesterol metabolism that might correlate with autism symptoms. When the research first began, the research team was only studying a single gene (the gene causing Smith-Lemli-Opitz Syndrome) in autism. Now the team can study 90 related genes. Currently, almost a dozen research team members are working to analyze the data collected over the past several years and prepare the results for publication.

By understanding the link between autism and cholesterol synthesis in the brain, this research holds the promise for novel and practical interventions and treatments that may significantly improve life for children with autism and their families.

Policies

The Original Trust document states that monies from the Trust shall be used:

“To aid, further, promote, develop, encourage and sponsor research, experiment and work in the cause, cure and treatment of human disease or in any field of medical research, and

To aid, further and promote medical education.”

With this statement as a guide, and having knowledge of the desires and concerns of the Trustor, Mr. Collins, and applicable laws, the Trustees over the ensuing years have established the following *general guidelines* under which grant requests are considered:

1. Disbursements are made only to applications which have established their tax-exempt status with the U.S. Treasury Department and are operated exclusively for scientific and/or educational purposes.
2. Preference is given to projects and programs conducted by qualified organizations within the State of Oregon.
3. Funds cannot be paid directly to or for the benefit of any specific individual. This does not preclude grants to qualified institutions for organized scholarship programs. Education is generally geared toward the education of health care professionals.
4. Grants for annual operating budgets or for deficit financing are not favored.
5. Disbursements are normally not made to “Private Foundations”, as defined in the Internal Revenue Code.
6. The Trust will not support efforts to influence legislation or other political action.
7. In considering projects or programs involving substantial funds, the Trust prefers to participate with other donors and expects the applicant to seek additional support.

Submission Procedures

Requests for information and applications for grants from the **Collins Medical Trust** should be presented in writing. Applications need not be formal and should include an Executive Summary suitably brief to present the necessary facts about the applying organization and the project for which the grant is being sought, supported by sufficient technical detail to present a clear picture of the project and expected outcomes. Project outcomes should be clearly articulated, along with an evaluation plan that will determine how successful the project was in attaining its objectives.

The application should include (If the Trustees believe further information is required, they may request an interview with a principal of the applicant and/or a visit to the applicant’s facility):

1. The exact name of the organization or agency making application, and the specific date when requested funds will be required.

2. A copy of the letter from the Treasury Department of the United States which grants tax exempt status; also a statement that the applicant is classified as “Not a Private Foundation”, as defined in the Internal Revenue Code.
3. The nature of the project for which funds are requested. Projects seeking funding for symposiums, seminars or conferences should contain details regarding course evaluations.
4. Curriculum vitae of the investigator(s). NIH format is preferred. Junior investigators should identify their primary mentor(s) as preference is given to projects associated with respected mentor(s).
5. Bibliography supporting the project.
6. In research projects involving human subjects, the status of IRB approval should be included.
7. A budget for the proposed project.
8. Estimated total of funds required for the proposed project and the amount sought from the **Collins Medical Trust**.
9. Anticipated source of balance required in excess of funds requested from the Collins Medical Trust.
10. Other sources being approached for financial assistance for the project.

Electronic submission (preferred): via email to nhelseth@collinsco.com (.pdf format preferred).

Hard copy submission: Submit the *original and 1 photocopy* of the proposal (including any supporting documentation). Mail to:

Nancy L. Helseth, Administrator
Collins Medical Trust
1618 S.W. First Avenue, Suite 500
Portland, OR 97201

(503) 471-2223
nhelseth@collinsco.com
<http://www.collinsmedicaltrust.org/>

Replies to Applications:

The Trustees meet *three times a year*, in January, May and September. Requests should be submitted by the *first day* of these months to receive timely consideration. It is not possible to react to emergency requests for crash programs. When an application has finally been acted upon by the Trustees, it will be accepted or rejected in writing sent to the mailing address of the applicant by the first week in the following month.

Reports:

The organization receiving a grant from the **Collins Medical Trust** has a responsibility to report on the use of the funds granted. Unless otherwise indicated at the time disbursement is made, reports are requested to be made annually until the entire grant has been expended. These reports should cover not only progress, but also evaluate the results being achieved. Additionally, throughout the duration of the project, any substantial changes in scope, personnel, or funds that are re-directed from the original purpose, should be reported to the Administrator of the Collins Medical Trust for approval by the Trustees at their next regularly scheduled meeting. Lastly, the Collins Medical Trust appreciates acknowledgment, primarily in scientific publications, for their contribution in support of the project.

Trustee Biographies

Walter J. McDonald, MD, MACP

Walter received his undergraduate education at Williams College and his MD degree at the University of Michigan. Following a residency in internal medicine at Oregon Health Sciences University, he returned to Michigan for training in Endocrinology. He is certified in both internal medicine and endocrinology.

Walter was the Chief of Medicine at the Portland Oregon VA Medical Center for 12 years beginning in 1979. He then assumed the role of Associate Dean for Education at the Oregon Health Sciences University. In 1995 he became the CEO of the American College of Physicians. In 2002 he assumed the role of CEO of the Council of Medical Specialty Societies, a position he held until 2008.

Walter serves on the Executive Committee of the Physicians Consortium for Performance Improvement, and is Chair of the ACP Foundation and a Board member on several other foundations.

He is a member of Alpha Omega Alpha and has been elected as a Master of the ACP. He has been recognized by Oregon Health Sciences University as Alumnus of the Year (1998) and has been recognized by a number of organizations for both his teaching and leadership skills.

His primary interests include quality improvement, continuing and graduate medical education, and professionalism.

Elizabeth Eckstrom, MD, MPH

Elizabeth is a geriatrician who specializes in promoting an active lifestyle in older adults and issues relevant to healthy aging in women. She is Director of Geriatrics at Oregon Health & Science University in Portland, Oregon, Section Chief of the Division of General Internal Medicine & Geriatrics, and Associate Professor of Medicine.

Her research has focused on teaching residents how to counsel elderly patients in physical activity, doctor-patient communication, and tai chi for prevention of falls in older people. She also studies the effectiveness of training primary care faculty in geriatrics, and speaks regionally and nationally on strategies to optimally care for older patients in primary care practice.

Personal interests include travel, windsurfing, telemark skiing, gardening, and reading.

Truman W. Collins, Jr.

Truman is the son of the founder of the Collins Medical Trust (Truman W. Collins, Sr.), and has been a trustee since 1990. Truman earned his Master's degree in Computer Science from Stanford University in 1987.

In addition to serving as Trustee of the Collins Medical Trust, Truman is the President of The Collins Foundation, and a board member of The Collins Companies. He also serves as a trustee of the OHSU Foundation, is a committee member of the Medical Research Foundation, and is a board member of The Chalkboard Project—an initiative of Foundations for a Better Oregon.

Truman also works part-time as a software engineer for Mentor Graphics Corporation in the area of Computer Aided Engineering software used for the design and fabrication of integrated circuits.

Cover photo: DNA Sculpture by Santiago Calatrava in *Ciudad de las Artes y las Ciencias*, Valencia, Spain
Photograph by: Rob Ettridge