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Crossroads

With Dr. Richard Merkin

The unique perspective of Richard Merkin, M.D., as Innovation, Technology, Legislation and Care Delivery come together to impact the future of population health



Rising to the Challenge to Advance Global Health

To explore the extensive possibilities of optimized healthcare delivery, we must expand our field of view past the familiar and tap into unique perspectives across multiple areas of study. When we embrace technology and mathematics, we discover how innovation can translate into real-world health benefits for our members and communities.



In our feature article, we cover how a new prize in biomedical technology aims to inspire international efforts to develop novel technologies that impact health. We also cover some of the ways our Heritage affiliates are incorporating artificial intelligence and other technologies to improve patient care, access, and health outcomes.

As we delve further into an age of technological advancement than ever before, we are reminded that to be true healthcare visionaries requires equal parts cutting-edge innovation, learned experience, and real human connection. Together, we can use the power of technology to grow closer as a scientific

community, find the answers to our questions, and make leaps and bounds toward improved global health.

Richard Merkin, M.D.
President and CEO of Heritage Provider Network

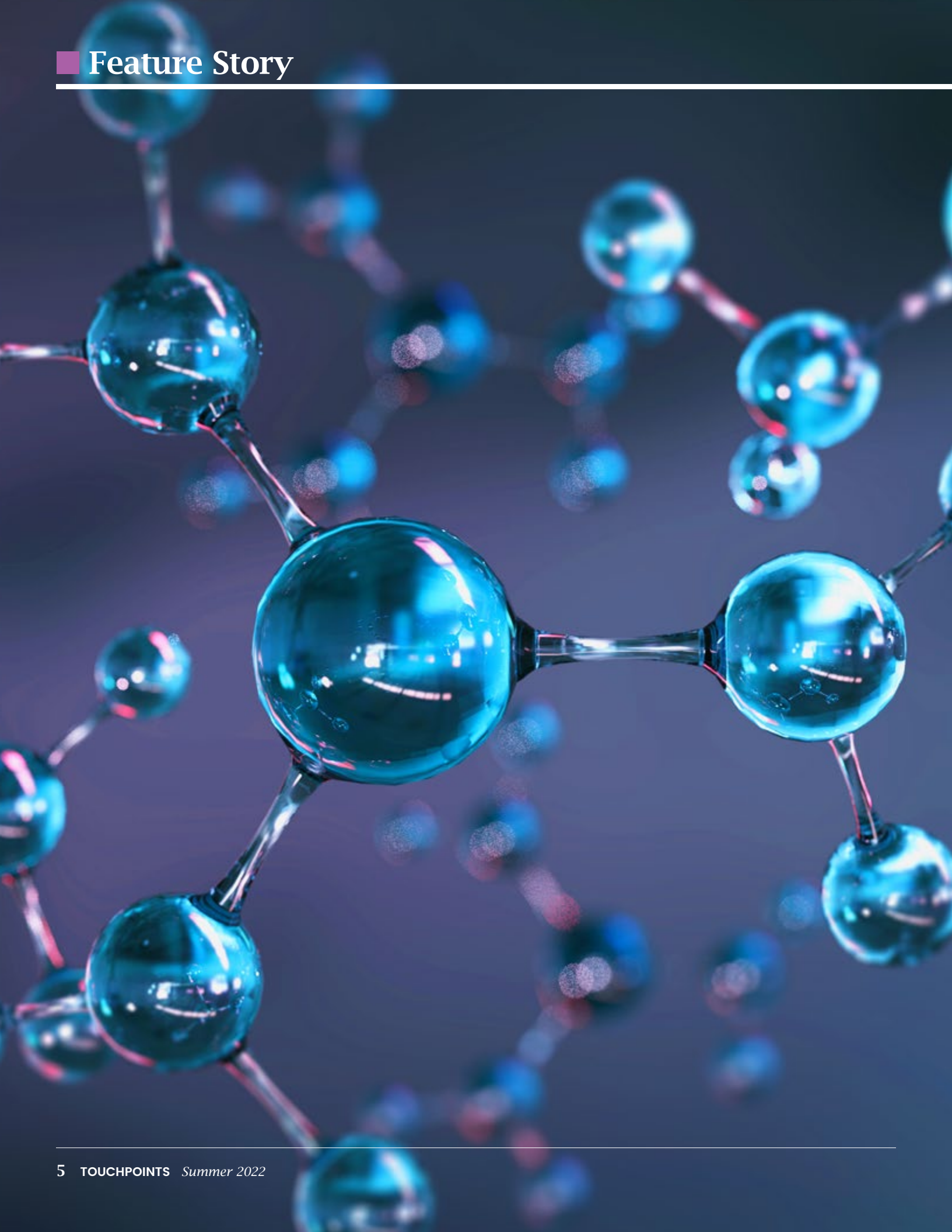


Richard Merkin, M.D.

Healthcare visionary Richard Merkin, M.D., has spent the last 40 years implementing a successful, workable business model to address the needs and challenges of affordable managed healthcare.

Announcing the Merkin Prize at the Broad Institute of MIT and Harvard







Broad Institute Director Todd Golub (pictured left) and the Broad community honored Dr. Richard Merkin (right) at a reception on May 18, 2022, in Cambridge, Massachusetts. Photo by Erik Jacobs

The Richard N. Merkin Prize in Biomedical Technology

The Richard N. Merkin Prize in Biomedical Technology, based at the Broad Institute of MIT and Harvard, will annually award up to four individuals who have developed technology that has substantially impacted human health.

Richard Merkin, M.D., is well known for his many years spent advancing biomedical innovations aimed directly at improving patients' lives. At the Broad Institute of MIT and Harvard in Cambridge, Massachusetts, Dr. Merkin has established an ecosystem of transformative science programs and endowments which support major cutting-edge research and more than 20 promising early-career scientists.



Above, pictured left to right, Julian Willis, Amit Choudhary, David R. Liu, Anne Carpenter, and Feng Zhang joined Dr. Richard Merkin (third from right) on May 18, 2022. Zhang was named a Merkin Fellow in 2012-13; Carpenter is a 2018-19 Fellow. Photo by Erik Jacobs.

“We envision this prize as celebrating the most impactful health technologies and inspiring talented new leaders to enter the field.”

~ Todd Golub

The Global Search for Biomedical Innovators

In May 2022, The Merkin Family Foundation, in collaboration with the Broad Institute, announced the Richard N. Merkin Prize in Biomedical Technology. This major new prize will recognize the critical link between innovative technology and improving human health, and raise awareness of the inspiring people doing this transformative work. The prize was announced at the

Broad Institute of MIT and Harvard during a series of events, including a science symposium and gala dinner honoring Dr. Merkin for his work to advance the next generation of scientific pioneers. Speakers included Dr. Merkin; Merkin Institute for Transformative Technologies in Healthcare Grantees Paul Blainey and Veronika Shoba, Merkin Institute Fellows Anne Carpenter and Feng Zhang, Richard Merkin Professor and Director of the Merkin Institute for Transformative Technologies

in Healthcare David Liu, Liu Lab postdoctoral research scientist Julian Willis, and Director of the Broad Institute of MIT and Harvard Todd Golub.

“We envision this prize as celebrating the most impactful health technologies and inspiring talented new leaders to enter the field,” Golub shared at the May 18 event. “Dr. Merkin has a long history of supporting visionary early-career scientists through his philanthropy, and we are proud to partner with his team on this prize to help celebrate and encourage transformative biomedical technology development around the world.”

The Broad’s mission and Dr. Merkin’s vision go hand-in-hand, with the Broad Institute launching in 2004 to empower this generation of creative scientists to transform medicine.

“To describe the molecular components of life and their connections; discover the molecular basis of major human diseases; develop effective new approaches to diagnostics and therapeutics; and disseminate discoveries, tools, methods, and data openly to the entire scientific community” is the ethos of their founders at MIT, Harvard, Harvard-affiliated hospitals, and the visionary Los Angeles philanthropists Eli and Edythe L. Broad. The Broad Institute includes faculty, professional staff and students from the MIT and Harvard biomedical research communities and beyond, with collaborations spanning over a 100

private and public institutions in more than 40 countries worldwide.

The Broad Institute-based Richard N. Merkin Prize in Biomedical Technology anticipates to be a truly utilitarian opportunity to harness the creativity of the global scientific community at large. The prize will annually recognize up to four individuals from anywhere in the world who have developed a technology that has had a substantial impact on human health with a considerable cash award. Eligibility for the Merkin Prize in Biomedical Technology extends to all investigators who have developed relevant health innovations, regardless of their place of employment, including academia, the commercial sector and government.

“By shining a light on the innovators making a difference in patient care through engineering, technology and across the life sciences, we hope to inspire further innovation to impact enhanced care for patients,” says Dr. Merkin. “Our goal is to recognize these innovators as they create better care opportunities for patients everywhere.”

Harold Varmus, former director of the National Institutes of Health and recipient of the Nobel Prize in Physiology or Medicine for his work on the origins of cancer, will chair the award selection committee. Among other considerations, the committee will select individuals who have developed technologies that have the potential to help level the healthcare playing field and make advanced

healthcare accessible to all. “The role of technology is too often overlooked when awarding prizes for discoveries that improve human health,” Varmus said. “This new prize will highlight the importance of technology for driving discovery and for applying new knowledge to the prevention and treatment of disease.”

“Our goal is to recognize these innovators as they create better care opportunities for patients everywhere.”

~ *Dr. Richard Merkin*

Trailblazing a Road of Scientific Exploration

The Merkin Prize in Biomedical Technology is not Dr. Merkin’s first prize competition, having launched several other competitions and endowments including the \$3 million Heritage Health Prize, a global challenge for entrants to create an algorithm to predict and prevent avoidable hospitalizations, potentially saving the country over \$30 billion annually. And Dr. Merkin has supported the Broad Institute of MIT and Harvard through the inaugurations of several other transformative science programs.

“This new prize will highlight the importance of technology for driving discovery and for applying new knowledge to the prevention and treatment of disease.”

~ *Harold Varmus*

The Merkin Prize is the newest addition to a roster including the Merkin Institute Fellowship, the Merkin Professorship, the Merkin Institute for Transformative Technologies and the Merkin Research Fund.

Established in 2012, the Merkin Institute Fellowship was the Broad Institute’s first endowed fellowship, reflecting Dr. Merkin’s belief in the impact philanthropy can have on scientists at pivotal moments of their careers developing technologies that can accelerate a field. More than 20 scientists have benefited from the Merkin Institute Fellows program, and receive full support for an innovative project for one

year. Fellows may use the funds as they determine, be it for salaries, lab costs, research expenses or something else related to the advancement of their projects. An expectation, but not an obligation, is that funds from the Fellowship will nurture research to a point where it can subsequently attract funding from federal grants or other philanthropic sources. Among the first awardees were CRISPR pioneer Feng Zhang and Sangeeta Bhatia, a bioengineer who has performed breakthrough research on liver regeneration and malaria.

Shifting the Paradigm to Transform Technology

The Merkin Institute for Transformative Technologies in Healthcare was established in 2017, supporting projects with the potential to transform fields through paradigm-shifting methods and technologies meant to have a profound effect on therapeutics, diagnostics and data. Projects have included a new class of drugs created by the Amit Choudhary Lab to treat diseases, such as diabetes and several cancers linked to abnormal protein phosphorylation, which is a key cellular event that can alter the structure and function of a protein, and a new drug-development paradigm from the Ron Raines Lab that enables drugs to target a specific type of human cell or a particular microbial pathogen.



As part of the 2017 gift to launch the Merkin Institute for Transformative Technologies in Healthcare, Dr. Merkin funded the Richard Merkin Professorship. David Liu, a core institute member at the Broad and the inaugural Richard Merkin Professor, ensures that the Merkin Institute for Transformative Technologies in Healthcare achieves its mission by selecting the most promising projects that draw on the



expertise of researchers at the Broad, Harvard, MIT and the Harvard-affiliated hospitals.

The Merkin Prize in Biomedical Technology, Dr. Merkin's newest transformative gift, will also establish an endowment for the Merkin Fund, which will support the most creative and promising research directions in fundamental science. By creating an environment where innovation is both encouraged and rewarded,

Dr. Merkin and his collaborators are actively increasing the parameters around what can be done and what has been thought to be scientifically possible.

Read more detailed information about the nomination process for the 2023 award later this year at merkinprize.org.



Caltech Launches Merkin Center for Pure and Applied Mathematics


Deepening his long-standing support of the university, Dr. Richard Merkin supported Caltech in launching the new **Richard N. Merkin Center for Pure and Applied Mathematics**, which will catalyze scientific progress by creating a hub for mathematical research on campus. The center will bridge disciplines, connect research in disparate areas that center on the development of mathematical ideas and foundations, and amplify campus activities in fields ranging from pure mathematics to computational biology and quantum sciences. By hosting conferences and extended visits by world-leading mathematicians, it will propel new collaborations and inspire innovation.

“By forging stronger connections among the Institute's mathematics initiatives, the Merkin Center will provide researchers with new and exciting opportunities to collaborate as they tackle important scientific and technological challenges,” says Provost David A. Tirrell, the Ross McCollum–William H. Corcoran Professor of Chemistry and Chemical Engineering and holder of the Carl and Shirley Larson Provostial Chair. “These connections will both bolster fundamental research and unlock practical applications that benefit society. We are grateful to Dick Merkin for his generosity and vision.”

Dr. Merkin adds, “As Leonardo da Vinci famously wrote, ‘No human investigation can be called real science if it cannot be demonstrated mathematically.’ Mathematical principles underlie advances across the biological, physical and social sciences, and drive discovery at the intersection of science and engineering. I am pleased to establish the Merkin Center and am confident that it will become an important source of ideas and breakthroughs that will deliver real-world improvements for humanity.”

A PASSION FOR MATHEMATICS

As well as endowing the new center, Dr. Merkin and the Merkin Family Foundation have gifted funds to renovate the eighth floor of Caltech Hall. The reconfigured space, scheduled to open in early 2023, will provide a home for the center as well as a base of operations for the American Institute of Mathematics,



“Mathematical principles underlie advances across the biological, physical, and social sciences, and drive discovery at the intersection of science and engineering.”

~ Dr. Richard Merkin, President and CEO of Heritage Provider Network

which is relocating from its current headquarters in San Jose, California, to Caltech.

Sergei G. Gukov, the John D. MacArthur Professor of Theoretical Physics and Mathematics, has been named director of the Merkin Center. A member of the Caltech faculty since 2005, Gukov is known for important concepts relevant to string theory, quantum field theory and pure mathematics.

“Caltech has cultivated extraordinary scholars who think deeply about landmark problems in pure mathematics and collaborate across disciplines,” says Fiona A. Harrison, the Harold A. Rosen Professor of Physics and holder of the Kent and Joyce Kresa Leadership Chair in the Division of Physics, Mathematics and Astronomy. “The Institute is also home to a diverse community of researchers who push the frontiers of applied mathematics in areas as wide-

-ranging as algorithmic economics, computational biology, robotics and autonomous control, and quantum information and computing.

The Merkin Center for Pure and Applied Mathematics will broaden and deepen the impact of the mathematical sciences across campus. As a physician and healthcare executive, Dr. Merkin has devoted much of his philanthropy to supporting basic science and its translation into medical treatments and cures. His love of mathematics, his undergraduate major, has been another significant thread throughout his engagement with Caltech.

Dr. Merkin previously endowed two mathematics professorships at the Institute. These positions, together with the Richard N. Merkin Distinguished Visiting Professorship in Artificial Intelligence, will be woven into the Merkin Center.



“Richard Merkin is a remarkable philanthropist, making possible fundamental discovery across a broad range of fields and encouraging intersections with the practical.”

~ Thomas F. Rosenbaum, Caltech President, Sonja and William Davidow Presidential Chair and Professor of Physics

Jakša Cvitanović, the Richard N. Merkin Professor of Mathematical Finance and director of The Ronald and Maxine Linde Institute of Economic and Management Sciences, is an expert in financial economics who focuses on the intersection between computer science and economics. Nikolai Makarov, the Richard Merkin Distinguished Professor of Mathematics, has worked extensively in complex analysis, which investigates functions of complex variables. This field is fundamental to many branches of mathematics and has applications in the natural sciences and engineering. Both Cvitanović and Makarov will serve as advisers to the new Merkin Center for Pure and Applied Mathematics, together with Elena Mantovan, a professor of mathematics who focuses on arithmetic geometry and number theory.

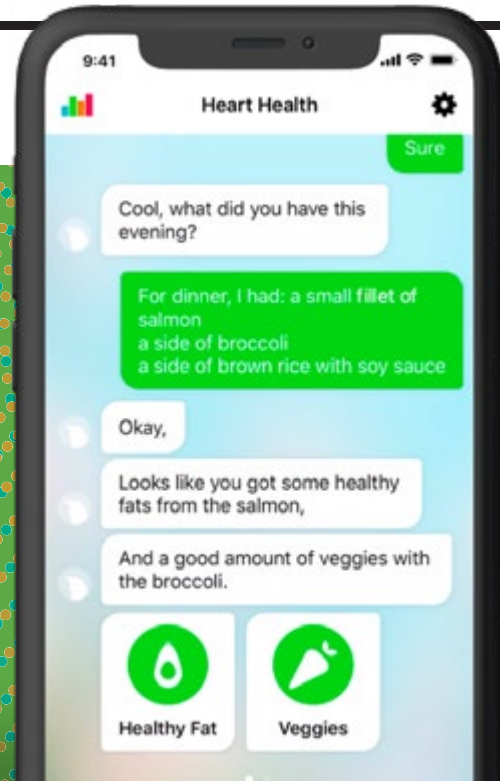
MATHEMATICS AT CALTECH

Both the focus and impact of Caltech's pure mathematics program is expansive. Mathematics scholars at the Institute work together and with colleagues across disciplines to untangle some of the most difficult problems in the field and have garnered high honors for pushing the frontiers of analysis, combinatorics, group theory, mathematical physics and number theory. They have written texts that are considered foundational to the discipline, and the Institute relies on them to help impart the quantitative skills in which all Caltech graduates become well versed.

Mathematics is also central to the work of faculty and students in numerous other areas across campus, in part due to the sheer amounts of data being collected. Among the researchers who stand to benefit from partnership with the Merkin Center are those working on models of neural processing and brain function, predictive modeling of healthcare diagnoses, election security, earthquake modeling, “smart” energy grids, and climate models to enable more accurate prediction of droughts, heat waves and rainfall extremes.

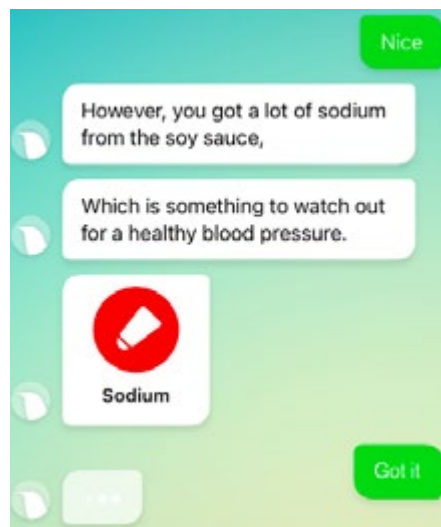
“Richard Merkin is a remarkable philanthropist, making possible fundamental discovery across a broad range of fields and encouraging intersections with the practical,” says Caltech president Thomas F. Rosenbaum, the holder of the Sonja and William Davidow Presidential Chair and professor of physics. “Above all, Dick takes joy in making it possible for researchers to thrive, whether they be students, postdocs or faculty members.”

Impacting Lives With Technology at Desert Oasis Healthcare



At Desert Oasis Healthcare, an increasingly streamlined collaborative drug therapy management (CDTM) program and a new artificial intelligence coach for cardiovascular health have resulted in a win-win-win for patients, physicians and the medical group.

In 2009, Desert Oasis launched its CDTM pilot with a focus on diabetes. Pharmacists became an integral part of patient care teams, working in tandem with primary care physicians to improve clinical results and reduce overall healthcare costs. They quickly saw a significant drop in the rate of poorly controlled diabetes, earning a five-star Medicare Advantage rating. The pilot proved especially useful for patients dealing with one or more chronic diseases and medication coordination needs. “We don’t charge



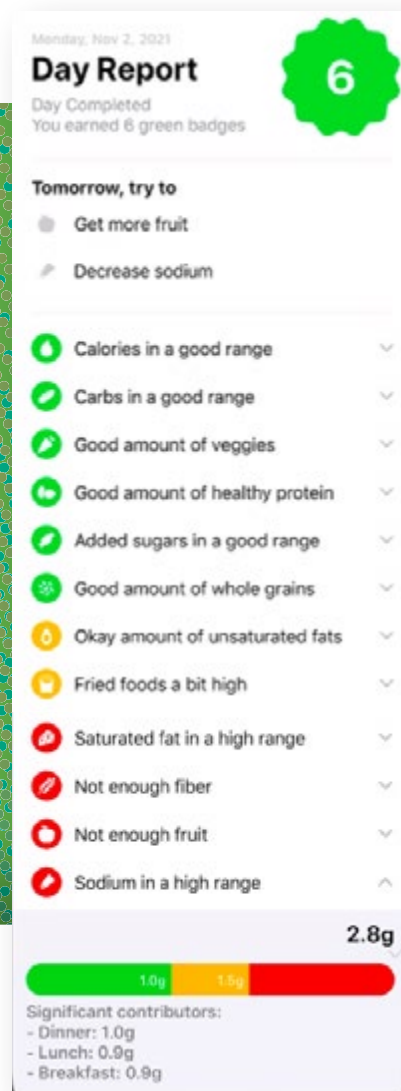
co-pays, which can serve as a barrier to accessing services provided by the pharmacist,” says Lindsey Valenzuela, PharmD and associate VP of Population Health Integration.

Since then, collaborative drug therapy management has enhanced patient outcomes in numerous ways, including reduced emergency department and hospital admissions, as well as notable improvement in behavioral health and chronic conditions, such as COPD, asthma, diabetes, hypertension and more. Physicians see CDTM’s value in reducing part of their workload, allowing them to address the acute needs of more patients. And, as patients recognize their own improved health and ability to find answers to their questions, Desert Oasis has watched positive satisfaction survey results increase.



Currently, Desert Oasis’s CDTM practice includes a “virtual pharmacist” software through Arine, an internal tool used to ensure patients are on the safest and most effective medications. A collaboration with Wellth uses smartphone technology to help achieve a 91% diabetic control rate, reduce the use of the emergency room and inpatient hospital visits, and has expanded to include behavioral health patients.

A new program from Lark Health is also improving care for patients monitoring heart conditions. Eligible members can now prevent and manage atherosclerotic cardiovascular disease (ASCVD) and coronary artery disease



(CAD) through artificial intelligence. “We are committed to offering innovative technology solutions to all our patients, so they can manage their health better than ever before,” says Valenzuela. “That’s why we’re so excited to offer this Lark Heart Health coaching program at no cost to our eligible cardiac members.”

With nearly half of all American adults having some form of cardiovascular disease, it is the leading cause of death globally and one of the most expensive chronic conditions. Heart disease

and stroke cost the U.S. healthcare system roughly \$214 billion annually. Yet, too few medical providers, coupled with challenges to healthcare access, sometimes leave patients with limited care options, gaps in care, and insufficient education and empowerment to self-manage their heart health. Desert Oasis aims to change that by identifying innovative new solutions like Lark Heart Health.

“We are proud to be collaborating with an innovative value-based care provider like Desert Oasis Healthcare to launch and evaluate our novel, AI-driven Lark Heart Health program,” said Jason Paruthi, M.D., medical director at Lark. Built using a cognitive behavioral therapy framework and a design based on American Heart Association guidelines, Lark Heart Health provides a remote, heart-health coaching tool that helps users improve healthy lifestyle behaviors, lose weight, and reduce stress levels, ultimately decreasing their risk factors for heart disease. Through a program that includes real-time personalized coaching, Lark will provide the tools needed to better prevent and manage ASCVD and CAD.

With so many valuable digital tools available today, healthcare organizations like Desert Oasis Healthcare are helping to lead the way toward maximized technological integration into patient care.



HOW HERITAGE SIERRA MEDICAL GROUP USES

Innovative QR Code Technology

to Connect Communities to Health Education

When Heritage Sierra Medical Group launched QR code technology, they did it to digitally distribute health education at community events with both user-friendliness and sustainability in mind. The technology was implemented not only to improve accessibility to Heritage Sierra Medical Group's full collection of health education and lifestyle guides, but do so in an eco-friendly format.

A QR code acts as a unique barcode to direct users to linked information when scanned. Instead of distributing physical materials, using QR codes eliminates the need for printing and instead guides users to content hosted online. First debuted by Heritage Sierra Medical Group at the annual Vegan Festival (Veg Fest), event attendees were encouraged to scan the displayed QR code to access a complimentary health education library. Topics varied from lifestyle practices and recipe guides to condition-specific information — all developed by Heritage Sierra Medical Group's providers.

In addition to distributing health education resources, Heritage Sierra Medical Group uses QR code technology to share information on its services, providers and locations. QR codes were implemented to direct individuals to self-schedule a tour of the Heritage Sierra Medical Group office of their choice. Users can also opt-in to learn more about Heritage Sierra Medical Group's primary care physicians if seeking a new provider for their care.

Since launching this technology in June, the QR codes have been a worthwhile endeavor of sustainability and increased access, connecting the Santa Clarita and Antelope Valley communities to Heritage Sierra Medical Group's services and health education resources with ease.



Well Met at High Desert Medical Group Wellness Center

By Dennis Anderson, LCSW, *Licensed Clinical Social Worker, HDMG Community Relations*

About three years ago between games of bingo and canasta at the High Desert Medical Group Senior Wellness Center, Bob Wright and Lois Meyer discovered they had a lot to talk about. Bob was just turning 90 and Lois was in her early 80s, but both quickly discovered that they shared a history, though they had spent most of their lives thousands of miles apart. It came down to one word: Baltimore.

Though a few years apart in age, they grew up within about one block of one another in a small, close-knit community called Hamden. They also attended the same schools: No. 55 and No. 56. Now, here they were together in a different state more than 70 years later, in the same center playing card games.

“If we had known each other a little closer together, we might have been married!” Wright exclaimed.

“Yes, we might have,” Meyer agreed.

They could both recall the neighborhood bakery, New System Bakery. Wright relished the coconut buns, and Meyer loved the crème-filled donuts. Mostly, both remember good times of growing up in large, traditional families, and

they both liked playing at the same park, Roosevelt Park, and attending the carnivals on Payne Street.

At the Wellness Center, the two became fast friends, sharing the joys of the old neighborhood, but also warm companionship. The pandemic, and the lockdowns and shutdowns that came with it, separated them for nearly two years, but they quickly forged a fresh bond when the Wellness Center reopened recently for High Desert Medical Group seniors.

“I was asking everyone, ‘Where is Bob?’ and then he just walked in like it had been no time at all. I was so happy to see him,” Meyer said. “The isolation was the worst thing during COVID.”

“It was the worst,” Wright agreed. “I just sat all day by myself watching TV.”

They also both concluded that the medical care they receive at High Desert Medical Group played a real part in managing to maintain their health during the worst times of the pandemic.

“We get good care here at High Desert Medical Group,” Wright said. “You can’t beat it. My hat is off to that crew in the Urgent Care. If they hadn’t been there, I might not be here.”

Both Wright and Meyer lived lives of energy and adventure. A little younger than his brothers who served in World War II, Wright signed up for the Merchant Marine during the Korean War. He moved on to a successful business in plaster and construction. In the Baltimore of her youth, Meyer worked a bit at the Noxema plant. With her late husband a World War II veteran, she moved to the Antelope Valley nearly 70 years ago. She worked as a telephone operator, and in the heyday of community newspapers, she worked at the Ledger-Gazette, then in medical records. Wright moved to the Antelope Valley about 10 years ago to be closer to family.

“I just love California,” Meyer said. “The weather is wonderful. But to think we came all the way from Baltimore to meet here in Lancaster.”

Evidence from an enormity of research demonstrated that socializing is a key to physical and mental health, particularly in later years. Wright and Meyer are among the active seniors proving that at the High Desert Medical Group’s Senior Wellness Center.

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Recognition of Commitment and Excellence

The recognition we have received demonstrates our practices in excellence. We're proud to be awarded for our commitment to our members and our community.



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Recognized by the Integrated Healthcare Association for our diabetic registries