

Your Support Made a Difference



FY 2017 REPORT TO DONORS

July 1, 2016 - June 30, 2017

Our patients are at the center of everything we do at Jeffrey M. Carlton Heart & Vascular Institute, from our world-class physicians, dedicated to practicing at the highest levels, to our nurses, committed to learning and integrating best practices into their patient care. Hoag's Jeffrey M. Carlton Heart & Vascular Institute is proud to be among the top hospitals in the nation offering the latest technology and top-tier facilities—all to help us offer our patients the highest quality of care. Nationally renowned, the Institute is the leader in Orange County with dedicated clinical programs such as the **Nancy & Bill Thompson Heart Valve Center** and Hoag Aortic Center.

All of this is made possible by the generosity of donors. This report is a summary of the impact that you made with your support in fiscal year 2017 (July 1, 2016 - June 30, 2017).

HOAG
PROMISE

OUR CAMPAIGN TO LEAD,
INNOVATE & TRANSFORM



Jeffrey M. Carlton Heart & Vascular Institute
Cath Lab Team

Leading the Way in World-Class Care

Our community counts on us to provide the most advanced care available. Thanks to community support, Jeffrey M. Carlton Heart & Vascular Institute offers pioneering surgical techniques including minimally invasive heart surgery, intraoperative ablation for treatment of arrhythmia, beating heart surgery and heart bypass. Patients from across Orange County, the state and the nation come to Hoag for exceptional care.

Most Advanced Cath Labs on the West Coast

Annually, as many as 4,000 patients come to Hoag for an array of procedures to diagnose and treat heart and vascular conditions including cardiac arrhythmias such as atrial fibrillation and supraventricular tachycardia (SVT). The facilities and technological upgrades, which were completed in November 2016, allow for greater efficiency, increase physician and staff safety and provide greater imaging capabilities which allow for more complex procedures.

For example, a major software upgrade greatly increased the quality of imaging. Cardiac Catheterization Lab (Cath Lab) teams now have the capability to overlay echocardiography and angiographic images to create a 3D view of a patient's heart.

Additionally, upgrades ensured greater safety for physicians, nurses and staff who work in the cath labs daily. They are now exposed to much less radiation – as much as 70% less – and have a more spacious and comfortable break room to rest between procedures. The break room also has an audiovisual system that allows them to host trainings on new technology, educational workshops and presentations.

Tim's Story: Saved by Donor-Supported Advancements

His heart stopped three times before 16-year-old Tim Deits of Huntington Beach arrived in the Cardiac Catheterization Lab (Cath Lab) at Carlton Heart & Vascular Institute. The donor-funded upgrades to the cath labs, which had only recently been completed, gave the surgical team a clear view of Tim's heart as they performed a rare procedure to install Impella pumps into each side of his heart.

The pump for the left side of the heart has been used for years, but the pump for the right side of the heart, which had recently been approved by the U.S. Food and Drug Administration, arrived at Hoag two months before. Tim is the second pediatric patient in the world to undergo the procedure and Hoag was the only hospital in Orange County to have the right-side Impella pump.

Thanks to philanthropy, Hoag has the most advanced cath labs on the West Coast, which tipped the scales in Tim's favor and saved his life.

"We are grateful to our physician leaders, philanthropists and vendor partners who come together with the greater purpose of taking care of our community. We are grateful to have the very best in people, technology and facilities to provide the best care possible."

*~ Angela Devlin, BSN, RN
Director of Cardiology Programs*

State-of-the-Art Cardiac Rehab

Cardiac rehabilitation at Hoag is a three-phase, comprehensive approach to helping individuals with heart disease, peripheral artery disease and heart or valve disorders to thrive. Patients who have experienced a heart attack, chest pain, interventional cardiac procedures like coronary angioplasty, stents and other events come to Hoag Cardiac Rehab in Newport Beach or Irvine for a program of monitored progressive physical exercise, risk factor modification, education and support.

“It is necessary for everyone who has had a procedure or condition to take a comprehensive approach to recovery,” says Hernan Martinez, supervisor of Cardiac Rehabilitation and Employee Fitness Program at Hoag.

At Hoag, a patient’s rehab begins while they’re in the hospital when they receive a visit from a registered nurse who explains the importance of cardiac rehab for their physical, mental and emotional health. During phase II, they begin a three-month program in a state-of-the-art facility that looks and feels just like a gym, but is staffed with certified exercise physiologists, registered nurses, dietitians and social workers. Patients are assessed for emotional and mental well-being.

“Many patients struggle with depression and ask, ‘why did this happen to me’ or ‘I was healthy before and now I’m not,’” Hernan explains. “But with time, they feel improved confidence to go back out into the world and return to their work, hobbies and interests.”

Once patients complete phase II of the program, many elect to continue with a maintenance program. “We have patients who have been here as long as 25 years and range in age from 35 to 90 years old,” Hernan says.

Hoag’s Nationally Acclaimed Cardiac Care Expands Services in Irvine

Last year, with great fanfare, Jeffrey M. Carlton Heart & Vascular Institute expanded services to Irvine. South county residents now have convenient access to a certified Hoag Vascular Lab as well as many of the Carlton Heart & Vascular Institute’s top-quality outpatient services such as echocardiogram, EKG and Holter monitoring and the unique Peripheral Arterial Disease (PAD) Supervised Walking Program, a non-invasive therapy for those suffering from peripheral arterial disease.



State-of-the-Art Cardiac Rehab Gym

Anthony Caffarelli, MD
 Director of Hoag Aortic Center
 and Co-Director of
 Cardiothoracic Surgery



Hoag on the Short List for Clinical Research

Safety and Effectiveness of Transcatheter Aortic Valve Replacement in Low Risk Patients

Hoag was among three hospitals in Southern California to be selected – and the only community hospital – to participate in the clinical trial to establish the safety and effectiveness of Transcatheter Aortic Valve Replacement (TAVR) in patients who are at low risk of complication during Surgical Aortic Valve Replacement (SAVR). Previously, only patients that could not survive open-heart surgery were eligible for TAVR. That meant that open-heart surgery was the only option for low risk patients.

“Surgical aortic valve replacement (SAVR) has been the gold standard for treating aortic stenosis for many years,” said Anthony Caffarelli, MD, director of Hoag Aortic Center and co-director of Cardiothoracic Surgery. “As the TAVR trials have shown, TAVR is a good solution for inoperable and high-risk patients. Intermediate risk patients have options between SAVR or TAVR; however, until now, the low-risk population has been unstudied. This study gives people in this group access to TAVR and, at the same time, by studying the long-term durability of the valve, Hoag contributes to the advancement of health care.”

Hoag was selected as a site for this study due to the presence of research study nurse coordinators and its advanced facilities, all provided by philanthropy.

The TAVR procedure at Hoag is a team effort that includes cardiac surgeons, cardiologists, interventionalists, cardiac anesthesiologists, echo cardiologists and a nurse coordinator which is performed in the state-of-the-art **Bob & Marjie Bennett Advanced Cardiovascular Surgery Suite**, the first operating room of its kind in Orange County.

This year, ten patients were screened and eight patients were enrolled in the clinical trial including Ron Kesselman who wrote of his experience, “The entire procedure took slightly more than an hour and the only anesthetic was a sedative. I stayed the night and walked out of the hospital the next morning.” Two weeks later, he was cleared to return to full activities including playing 18 holes of golf.

“Philanthropy brings the latest technology to our community,” said Jorge M. Castellanos, MD, TAVR Interventional Cardiologist at Hoag. “It is an honor to be part of this study and bring advanced treatment to our patients.”



Rachel Russell, BSN, RNFA, (center) surrounded by many of her Jeffrey M. Carlton Heart & Vascular Institute physician and nurse colleagues at the 2016 Nurse of the Year ceremony.

Leadership in Patient Safety

Critical Situation Simulations Ensure Preparedness

Without support from the community, training and educational programs would not be possible, leaving critical gaps in care. Hoag nurses are developing life-saving initiatives to ensure their colleagues are prepared for worst-case scenarios. Twenty-year Hoag veteran Rachel Russell, BSN, RNFA, a cardiothoracic operating room nurse, led the development of simulation training for a small but critical population of post-operative patients.

“There is a very small risk that a post-operative heart patient would need to have their chest opened emergently in the Cardiovascular Intensive Care Unit (CVICU) due to bleeding or cardiac arrest,” she said. “The problem is reversible when a surgeon and a dedicated team can treat the patient quickly. The faster it’s done, the better the outcome for the patient.”

Rachel, who was recognized as Hoag Nurse of the Year in 2016 and was a nursing scholarship recipient in 2007, worked closely with a consultant to customize a simulation training program for new cardiac nurses and a skills refresher course for nurses at six-month intervals.

“For my CVICU nurse colleagues, the simulation course gives them more confidence along with the tools to provide care during an emergency procedure,” she says. “Our surgeons now have a system in place that supports them, and protects the patient, during this rare but serious event. On behalf of all of us, we thank the community for making this happen.”

The Gold Standard

Hoag received the Get With The Guidelines®–Heart Failure Gold Quality Achievement Award from the American Heart Association. For nine years, Hoag Heart Failure Program has been recognized by the American Heart Association, but this is the first year the program was awarded the Gold Quality Achievement Award. Thanks to philanthropic support, Dipti Itchhaporia, MD, **Robert & Georgia Roth Endowed Chair for Excellence in Cardiac Care** and medical director of disease management, leads the Congestive Heart Failure Management Program and the Anticoagulation Clinic at the Jeffrey M. Carlton Heart & Vascular Institute.

Her team, which includes Lisa Kuecker, MSN, RN, nurse practitioner, and Cathie Rassp, RN, chief educator, closely monitors and educates all heart failure patients from Hoag Newport Beach and Hoag Irvine based on the Get With The Guidelines best practices.

Starting from the bedside at the hospital, they make sure the patient and their family receive a comprehensive packet of information that also includes important contact information. Patient support doesn't end there. The Heart Failure team follows up to ensure each patient sees their primary care physician or cardiologist within a week and welcomes patients to attend monthly workshops that cover a variety of topics aimed at improving self-care and quality of life so they stay out of the hospital.

Dr. Itchhaporia and her team also conduct education for primary care physicians, cardiologists and nurses, as well as pharmacies and non-nursing hospital staff to keep them up-to-date on new therapies and tests. This year, they met with home health agency physicians and nurses to ensure patients are looked after throughout their care spectrum. "If a patient gets into trouble, the home health team can step in and help rather than automatically sending the patient to the emergency room," Dr. Itchhaporia said.

Last year, among the many research trials that included the introduction of new drug therapies for heart failure patients, Dr. Itchhaporia oversaw an iPad study. Ten heart failure patients received an iPad loaded with their specific medical information and a program that would automatically prompt patients to answer specific questions to monitor their condition. "They were able to take this iPad to their primary physician or cardiologist who could then assess them and accurately review their prescriptions to ensure they were on track," she said.

It is a vigorous challenge but Dr. Itchhaporia and her team are making an impact on patients' lives and that of their families. "Get With The Guidelines helps us to continually evolve and implement prevention processes that allow us to improve the quality of care we provide to heart failure patients, save lives and reduce health care costs by lowering the recurrence of heart attacks," she said.

Lisa Kuecker, NP, Dr. Dipti Itchhaporia, Robert & Georgia Roth Endowed Chair for Excellence in Cardiac Care and Cathie Rassp, RN



"I am extremely thankful to our donors who support us in managing and tracking our aortic patients. Not only have they made state-of-the-art facilities and technology available, they make it possible for us to foster relationships with our patients through this challenging time in their lives."

Rita Weise, NP

Acute Care Nurse Practitioner
Hoag Aortic Clinic

Health Care Navigation and Patient Advocacy Pilot Update

Thanks to a generous gift from **Pei-yuan Chia** and **Kitty Shen**, nurse navigators at Jeffrey M. Carlton Heart & Vascular Institute now have the tools to streamline patient data collection while coordinating appointments and communications among clinicians and specialists. The completion of the Health Care Navigation and Patient Advocacy Pilot Program transitioned nurse navigators from a "sticky note and paper" file system to a digital system that is more efficient and safe for patients according to Karen O'Connell, RN, MN, CCNS, clinical nurse specialist at **Nancy & Bill Thompson Heart Valve Center**.

A dedicated team of nurse navigators, IT specialists and senior leadership collaborated to create a user-friendly, secure, automated system that collects and stores detailed patient data, calendars and communications backed by intuitive software. The powerful

tool is HIPAA compliant and allows for robust data reporting and improvements. It also plays a critical role in tracking data for clinical trials and research conducted at the Carlton Heart & Vascular Institute.

Hoag Aortic Clinic Nurse Navigator: Rita Weise

Rita Weise, NP, Acute Care Nurse Practitioner in the Hoag Aortic Clinic, is grateful to be there for her patients and their families who are frightened by their aortic diagnosis. She coordinates the comprehensive active surveillance and surgery programs. As the point person in what feels like an overwhelming crisis to her patients and their families, Rita observes their noticeable relief when they work with her.

Honoring Legacies of Giving

Bob and Marjie Bennett



Ronnie and Byron Allumbaugh



Bob Bennett The Jeffrey M. Carlton Heart & Vascular Institute is deeply grateful to Hoag donor Bob Bennett, who passed away in December 2016. Bob left a legacy that will impact patients' lives for years to come. Thanks to his and his wife Marjie's philanthropy, Hoag is home to the innovative **Bob & Marjie Bennett Hybrid Cardiovascular Surgical Suite**. The Bennett Hybrid Cardiovascular Surgical Suite is designed to support Hoag's specially trained surgical teams in highly advanced procedures, hybrid treatment of atrial fibrillation, repair of abdominal and thoracic aortic aneurysms, all endovascular procedures and open-heart surgery when needed.

Byron Allumbaugh We are so grateful to have worked closely with committed Hoag donor and volunteer leader Byron Allumbaugh who contributed his time and talent as a member of the Hoag Hospital Foundation Board of Directors. Although we lost Byron in October 2016, he leaves a wonderful legacy of service and giving. Thanks to generous gifts made by friends of Byron to honor his memory, Hoag made important upgrades in audiovisual technology and online connectivity in the **Ronnie & Byron Allumbaugh Conference Center** at the Jeffrey M. Carlton Heart & Vascular Institute.

Leaders in Education

Part of being a leader in care is sharing expertise and new information with the greater medical community. Philanthropy makes possible four major conferences hosted by the Jeffrey M. Carlton Heart & Vascular Institute for clinicians who come from across the nation to learn and present best practices and the latest in advanced procedures.

7th Annual Cardiology Update:

The Heart of New Developments

Dipti Itchhaporia, MD, FACC, FESC, **Robert & Georgia Roth Endowed Chair for Excellence in Cardiac Care**, is the program director for this annual meeting of the California Chapter of American College of Cardiology designed to present state-of-the-art knowledge in cardiovascular disease.

Hoag Advances in Arrhythmia Management

Thanks to the generosity and support of **Pei-yuan Chia** and **Kitty Shen**, the Jeffrey M. Carlton Heart & Vascular Institute once again hosted the annual “Hoag Advances in Arrhythmia Management” conference developed by Neala Hunter, MD, and featured several Carlton Heart & Vascular Institute physicians as faculty speakers. Thanks to their generosity, Hoag nurses and clinical staff attend at no cost. Feedback from the more than 100 attendees praised presenters and indicated that the information presented would improve attendees’ procedural and cognitive skills as well as patient clinical outcomes.



Thanks to dedicated partners **Edwards Lifesciences Foundation**, Hoag conducted heart screenings at two Los Angeles Angels of Anaheim games in fall 2016 through the “Every Heartbeat Matters” grant.

Joel H. Manchester, MD

Distinguished Lecture Series

More than sixty physicians attended this year’s lecture titled “*Evolving Management of Atrial Fibrillation*.” Named in honor of Dr. Joel Manchester, former Chief of Cardiology, this annual donor-supported event continues his legacy of advanced education and patient care.

33rd Advanced Echo Conference

Pravin Shah, MD, MACC, and Natesa Pandian, MD, FACC, were the program directors for this important industry conference which provides an interactive, case-based learning opportunity focused on the latest developments in echocardiography.

Electrophysiology Technologists Certification

Thanks to the support of **Pei-yuan Chia** and **Kitty Shen**, Hoag’s highly specialized electrophysiology technologists continue to earn certifications through Loma Linda University’s Cardiac Electrophysiology Technologist hospital-based hybrid program.

Awards & Accolades

Your support allows us to perform at levels that are recognized nationally as meeting the highest standards of excellence. We are proud to spread the good news about our recent honors.

Hoag is the fourth highest volume provider of total robotic-assisted surgeries including mitral valve repair surgery. Colin Joyo, MD, has earned the Center of Excellence in Robotic Surgery (COERS) designation for thoracic surgery and cardiovascular surgery.

Additional distinctions include:

Hoag Ranked High Performing in 2017-2018 *U.S. News & World Report* in Abdominal Aortic Aneurysm Repair, Aortic Valve Surgery, Heart Bypass Surgery and Heart Failure.

Hoag Is Ranked a Top Cardiovascular Hospital Hoag Hospital in Newport Beach has been named one of the nation's 50 top cardiovascular hospitals for 2017 by Truven Health Analytics, which provides information and suggestions for improving the cost and quality of health care. Hoag was the only California community hospital to make the list. It was also included in the 2016 listing.

Hoag Receives Women's Choice Award

Hoag Hospital Newport Beach received the 2017 Women's Choice Award as one of America's best hospitals for heart care. It is the fourth consecutive year Hoag received the award.

100 Hospitals with Great Heart Programs

Becker's Hospital Review named Hoag to its list of 100 Hospitals with Great Heart Programs for 2016.

Anthem Blue Cross "Blue Distinction Center+"

Hoag recognized as "Blue Distinction Center+" designation by insurer Anthem Blue Cross' Blue Distinction Centers for Cardiac Care. The designation is given to health care facilities shown to deliver improved patient safety and better health outcomes based on objective measures.

American Heart Association's Get With The Guidelines® Heart Failure Gold Award

Hoag is the recipient of the American Heart Association's Get With The Guidelines® Heart Failure Gold award for achieving an average score of 85 percent or greater in all five heart failure achievement measures.

Thank you

The Jeffrey M. Carlton Heart & Vascular Institute is deeply grateful to the philanthropists who join us in our mission to bring together the best treatments, technology and staff to care for our patients.

For more information, please contact Hoag Hospital Foundation at (949) 764-7217. Please visit our website: www.HoagPromise.org.