

HOAG HOSPITAL FOUNDATION in support of Hoag

Scanner

Celebrating Hoag's Founding Family

George Hoag Family Foundation
Marks its 75th Anniversary

DONOR TRIBUTE

Marion Knott's Lasting Legacy at Hoag

MILESTONES

Orange County Vital Brain Aging Program Helps
Prevent and Delay Alzheimer's Disease

Pictured: George Hoag II

Dear Friends of Hoag:

When I think about the history of Hoag, I am struck by the steadfast commitment it took to get the project off the ground. Without the vision of the Reverend Raymond I. Brahams, the dedication of the Reverend O. Scott McFarland, and the influence of State Senator John Murdy, Jr., Hoag would not be what it is today.

However, a vision without resources is only a dream. When the George Hoag Family Foundation provided the needed funds at the critical moment, the dream of a hospital to serve Orange County became attainable. Indeed, the history of Hoag is inextricably linked with the Hoag Family. Prosperous and generous in equal measure, the Hoags created the George Hoag Family Foundation in 1940, and we celebrate its seventy-fifth anniversary in this issue.

I'm very pleased to have stepped into the role of Chair of the Hoag Hospital Foundation Board on the eve of another significant Hoag milestone—the launching of the biggest and most comprehensive fundraising campaign in Hoag's history. The remarkable commitment demonstrated by the early founders and supporters of Hoag is mirrored by our modern-day philanthropic partners.

Hoag's culture – from our donors, who give during their lifetimes and leave legacies through their estates, to our doctors and nurses, who are givers by profession, to our volunteer leaders, who serve Hoag and our community – our Hoag family is infused with the giving spirit.

It's an honor to serve with this tremendously talented and dedicated group of people who have rallied around the idea of ensuring world-class healthcare here in Orange County. And, it's a privilege to serve you, our philanthropic community. I never forget that in my role as Chair of the Foundation Board, I'm partnering with donors and community members to shape Hoag's future.

I deeply appreciate your continued support and look forward to what we will accomplish together going forward.

With gratitude,

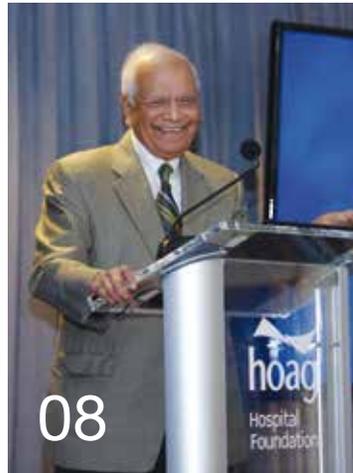


A handwritten signature in black ink that reads "Cindy Stokke". The signature is fluid and cursive.

Cindy Stokke
Chair, Hoag Hospital Foundation Board

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SCANNER FALL 2015



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Newport Harbor and Pacific Coast Hwy in the 1940s; Smaller inset photos: Three generations of Hoags help break ground for the hospital including George Grant Hoag II, Grace Hoag and George Grant Hoag III plus three shots from the first week the hospital opened.



George Grant Hoag and Grace Hoag

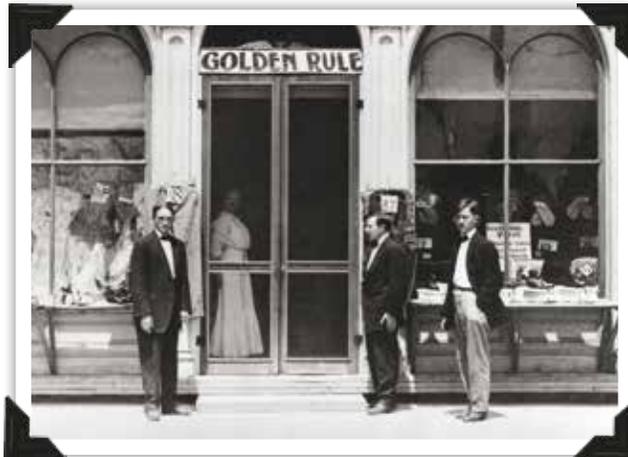
Celebrating Hoag's Founding Family

George Hoag Family Foundation Marks its 75th Anniversary

The story of the Hoag family parallels the histories of many of the families who made our nation great. People from modest backgrounds who worked hard, availed themselves of opportunities with courage and commitment, and provided subsequent generations with a bounty that was a direct result of their labors.

George and Grace Hoag spent 1896, their first year of marriage, working the Golden Rule General Store together in Wyoming. Their old-fashioned brand of hard work paid off when their store became part of the thriving J.C. Penney chain. George opened stores across Utah and eventually became Vice President of J.C. Penney in New York.

Mr. and Mrs. Hoag had invested in J.C. Penney with their labor and their capital. As the company became more successful, the Hoag family shared their good fortune by donating millions to scores of charities over the years.



Golden Rule general store (Circa 1911)

Memorial Benefiting a Community

In 1940, the Hoags established the George Hoag Family Foundation with their son, George Grant Hoag II. Later that decade, the George Hoag Family Foundation would become one of the founding benefactors of Hoag Hospital Newport Beach.

In 1944, the Reverend Raymond Brahams and seven Presbyterian Church members set out to raise a half a million dollars to build a hospital to serve coastal Orange County. They secured a site on the bluffs in Newport Beach and, through years of committed community building, raised the needed funds to begin the project. But the timing was against them. With the building boom after World War II, construction costs skyrocketed. When project costs doubled seemingly overnight, they were stalled as they began looking for additional sources of funds.



George Grant Hoag II, Grace Hoag and Hoag Hospital Foundation Board President and State Senator John Murdy, Jr., at the hospital ribbon-cutting ceremony.

At the same time, Grace Hoag had been looking for a way to honor her husband George who had passed away in 1948. When she heard about the hospital project, overlooking the city that George loved, she had found her memorial. In 1950, the George Hoag Family Foundation donated the needed \$500,000, the equivalent of \$5 million in 2015 dollars, and made it possible to begin construction.

Because of the outpouring of support from the George Hoag Family Foundation and the community, the hospital was completed in just two years. When Hoag Memorial Hospital Presbyterian opened on September 15, 1952, there were 75 beds, 68 staff physicians and 60 employees.

The Family that Gives Together

The Hoag family continued to give generously to the hospital and serve as its champions in many ways. Mrs. Hoag provided the funding that built and furnished nurses' quarters on the Hoag campus so that the staff could have an affordable place to live. She was a very active board member at the hospital, along with her son, George Hoag II. Mrs. Hoag played a vital role at the hospital until she died in 1970 at the age of 100.

George Grant Hoag II was a private investor and member of Hoag's hospital board from 1950 until he stepped down as board chairman in 1986. He is remembered by employees as being at the hospital all the time. He was energetic and supportive. An

optimistic person, he had a passion for helping people. He took this new enterprise, this new venture, personally.

George Hoag, his wife Patty, and the George Hoag Family Foundation, in partnership with the Hoag Hospital Foundation, were responsible for building the \$23 million Patty & George Hoag Outpatient Cancer Center in 1990. In 2008, the Hoag family honored its matriarch by establishing the Grace E. Hoag Executive Medical Director Endowed Chair, Hoag Family Cancer Institute, currently held by Burton L. Eisenberg, M.D.

Through the years, the George Hoag Family Foundation has continued to significantly support Hoag in many areas in addition to Hoag Family Cancer Institute. The Mary & Dick Allen Diabetes Center, the new residential program at the Hoag Addiction Treatment Center, SolMar Recovery and advanced primary care through Hoag Medical Group are a few of the areas the Hoag family has impacted.

"My grandparents and parents dedicated their lives to philanthropy. Today, the Hoag Family Foundation continues its legacy, through the leadership of the Foundation's third generation, in improving social conditions, promoting human welfare and alleviating pain and suffering," says Melinda Hoag Smith, president and CEO, George Hoag Family Foundation. "Hoag Hospital was where my father put his heart. We know he would be very proud that what he called 'Hoag Pride' is as vital to Hoag today as it's been since the beginning."

2015 marks the seventy-fifth anniversary of the George Hoag Family Foundation. The main focus of the George Hoag Family Foundation is funding non-profit organizations that support community healthcare programs, social service programs and youth programs in Los Angeles, Orange County and Central Coast areas of California.





A young man and a young Melinda Hoag Smith with Grace Hoag and George Grant Hoag II beneath a portrait of George Grant Hoag on opening day.



Rick Martin, Ed.D., M.S.N., R.N., is shown here with Marion Knott, Dr. Richard Afable and Ken Beall at the ribbon cutting ceremony for the Marion Knott Nursing Education Center.

Marion Knott's Lasting Legacy at Hoag

Marion Knott was a force of nature. She not only witnessed tremendous change take place in Orange County, she actively fostered its becoming an epicenter of healthcare, technology, the arts and business. With those changes came new challenges. According to those who knew her, Marion was not afraid to take a leadership role to find sensible and far-reaching solutions.

Although Marion passed away at the age of 92 in November 2014, she touched the lives of many. Through her deep commitment to education, she's created advancement opportunities for thousands of nurses through the Marion Knott Nursing Education Center at Hoag.

Passion for Education

In 2005, when Marion first learned of the statewide nursing shortage and severe cutbacks on nursing education, she made a \$700,000 founding donation to support the *Choose Nursing, Choose Hoag* initiative at Hoag.

"When I began hearing that there was such a long waiting list for students and so few could get into nursing school, it just seemed there was a better way," Marion said in a news release. "I think Hoag has the better way, and I find it very reassuring that Hoag has the vision to open a Nursing Education Center that will be state-of-the-art for the ongoing training and education of nurses."

Doug Meece, current chair of the *Choose Nursing, Choose Hoag* committee, worked closely with Marion and considered her a very dear friend. "As a child from a farming family, who lived the hardship of the Great Depression, education was one of her passions," he remembers. "Marion held a very strong belief in helping the less fortunate receive an education."

Community Challenge

True to form, Marion challenged donors to match her founding gift dollar-for-dollar. She was a woman who believed everyone should pitch in and do their part. Hoag's family of donors and members of the

community responded enthusiastically to Marion's challenge.

In 2007, the Marion Knott Nursing Education Center opened to provide Hoag nurses with advanced facilities to enhance their knowledge of health care best practices. It's the only one of its kind in Southern California designed specifically for continuing nursing education including orientation programs, student clinical rotations and licensure and career advancement classes.

While Marion would have been content to remain behind the scenes, Doug encouraged her to allow Hoag to name the education center in her honor. "I distinctly remember at the grand opening that Marion took a huge amount of pride in the center," he said. "She preferred to do things quietly; but when we told her how much it would mean to the nurses and donors to be associated with her name, she gave in."

Blueprint for Ongoing Excellence

The Marion Knott Nursing Education Center has played a significant role in Hoag's achievements, most recently in its third consecutive Magnet® re-designation which recognizes excellence in nursing by the American Nursing Credentialing Center. Currently, nearly 50 percent of Hoag nurses hold a BSN or higher. However, to maintain the elite Magnet® status, eighty percent of Hoag's nurses will need to hold a BSN or higher by the year 2020.

The Marion Knott Nursing Education Center, supported by the continuing generosity of donors, will help achieve that goal. Busy Hoag nurses have the opportunity to complete required BSN classes on-site at the Marion Knott Education Center through a partnership with California State University Long Beach (CSULB) and Vanguard University of Southern California. Those pursuing the higher degrees - MSN, MSN-Nurse Practitioner or higher - can also complete CSULB classes at the Center.

"Hoag's commitment to nursing is very costly and must be supported by philanthropy to sustain Marion's vision for providing advanced training for nurses throughout Orange County," said Rick Martin, Ed.D., M.S.N., R.N., senior vice president and chief nursing officer of Hoag. "Marion's generosity laid the foundation, and her generosity continues to inspire support for Hoag nursing education's growth and development."

Although Marion's passing has left a void in the community, all who knew her are proud that her legacy at Hoag thrives with each and every Hoag nurse who passes through the education center that bears her name.

Rick adds, "Marion believed wholeheartedly in our nurses, and her can-do spirit lives on at Hoag."

If you would like more information on how you can help Hoag's nurses, contact Hoag Hospital Foundation at (949) 764-7217.

Reaching Ever Higher

Nursing Achievements at Hoag

Hoag's annual Nurse's Day celebration in May 2015 was made even sweeter by Hoag's third Magnet® recognition earlier this year. Conferred as part of the American Nurses Credentialing Center's (ANCC) Magnet® Recognition Program, it's the highest honor an organization can receive for professional nursing practice.

Thanks to our donors and volunteer committee members, Hoag raised more than \$2 million for nurses in fiscal year 2015, supporting nursing excellence and allowing Hoag to grant 431 nursing scholarships. In 2016, the fundraising target for nursing is \$2.7 million to provide over 400 scholarships for nurses currently enrolled in BSN, MSN, MSN-Nurse Practitioner or higher programs.



Hearts for Hoag

Celebrating the Nancy & Bill Thompson Center for Cardiovascular Care at the Jeffrey M. Carlton Heart & Vascular Institute

In spring 2015, Hoag was pleased to celebrate the completion of the Nancy & Bill Thompson Center for Cardiovascular Care at the Jeffrey M. Carlton Heart & Vascular Institute. During a ceremony on March 5, Hoag Hospital Foundation recognized Nancy and Bill Thompson for their generous donation and honored past donors who made this project possible, including Bob and Marjie Bennett, Allan and Sandy Fainbarg, Ronnie and Byron Allumbaugh and the late Jeffrey M. Carlton.

During the unveiling event, donor Bill Thompson spoke about the importance of philanthropy. “Nancy and I are fortunate to be able to support great organizations, like Hoag, to save more lives and make our community healthier,” Bill shares. “We are honored to help Hoag continue its legacy as the county’s top-rated heart program.”

The grand opening marks the completion of the two-phase expansion.

Phase II features the opening of Hoag’s outpatient cardiac services, including the Nancy & Bill Thompson Heart Valve Center, Congestive Heart Failure Clinic, Arrhythmia Clinic, non-invasive cardiac imaging and vascular imaging.

“It is so exciting to see the completion of the Jeffrey M. Carlton Heart & Vascular Institute, with the opening of the Thompson Center for Cardiovascular Care,” says Robert T. Braithwaite, president and CEO of Hoag. “The Carlton Heart & Vascular Institute is recognized as one of the preeminent cardiovascular centers on the West Coast offering the most advanced treatment and facilities. Hoag continues to put its patients first and this state-of-the-art expansion is just another example.”

For information on how you can support outstanding heart and vascular care at Hoag, please contact Stacy Hunt at Stacy.Hunt@hoag.org or (949) 764-7210.

Nancy & Bill Thompson Center for Cardiovascular Care

Nancy & Bill Thompson Heart Valve Center
Arrhythmia Management Clinic
Congestive Heart Failure Clinic
Vascular Clinic
Cardiovascular Imaging





Circle 1000
Hoag Family Cancer Institute

A LEGACY OF SERVICE

Circle 1000's annual brunch with Author and Humanitarian Father Gregory Boyle raises over \$775,000 for cancer care at Hoag

Circle 1000, a group of vibrant, dedicated volunteers, has raised millions of dollars to support Hoag Family Cancer Institute. Continuing its tradition, the Circle 1000 Committee hosted its 28th Annual Founders' Brunch Celebration on May 4. More than 350 Circle 1000 members, friends, physicians and nurses gathered to celebrate a legacy of service to individuals, families and caregivers affected by cancer.

"Take a minute to look around the room and see what a difference we are making in the fight against cancer," said Beth Knapp, chair of the 28th Annual Founders' Celebration Brunch. "I am honored to be part of such an extraordinary group. Thank you for supporting Hoag Family Cancer Institute and for being a part of our Circle 1000 family."

Father Gregory Boyle, author and nationally-recognized humanitarian, brought the audience to laughter, tears and silence during his keynote speech.

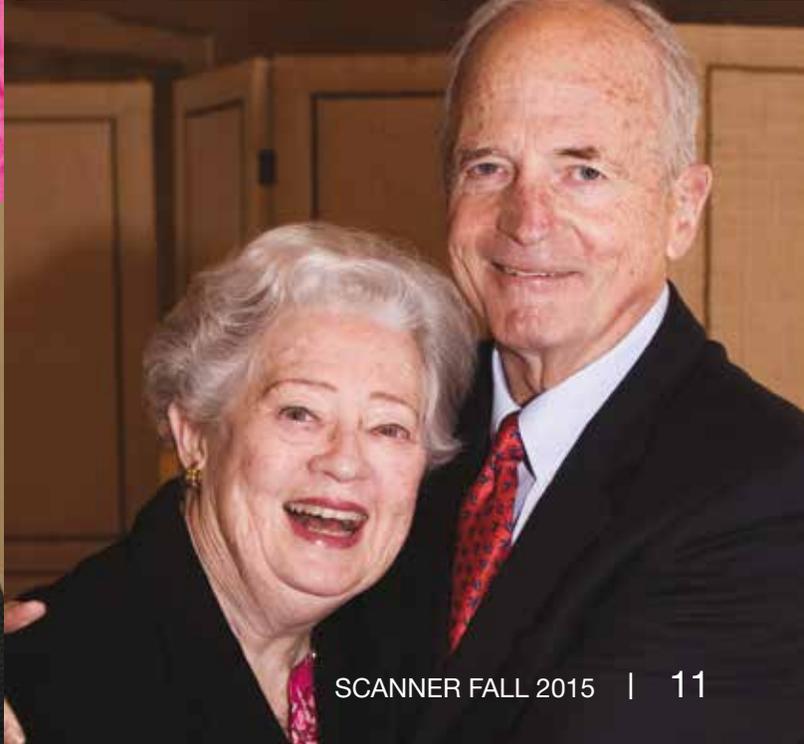
"Service is the hallway that gets you to the ballroom where you arrive at a place of connection and exquisite mutuality," he said. "At Homeboy Industries, I'm not the great healer for gang members in need of healing; the truth be told, we're all in need of healing. It's one of the things that unites us as members of the human family."

This year's brunch was dedicated in loving memory of Arden Flamson, a long-time member of Circle 1000 and past chair. In 2015, Circle 1000 raised more than \$775,000 for cancer care at Hoag.

Friends Who Care

When Sandy Sewell, Newport Beach resident and breast cancer survivor, founded Circle 1000 in 1987, she had a very simple goal of gathering a group of friends and asking each to contribute a minimum of \$1,000. She then tasked them with asking their own circle of friends to participate. From the powerful bonds of friendship, Circle 1000 grew to more than 1,000 friends whose annual support has allowed Hoag Family Cancer Institute to bring new technology, provide educational advancement for nurses and conduct clinical research.

For more information about Circle 1000, visit www.hoaghospitalfoundation.org. For more information on how you can support Hoag Family Cancer Institute, contact Carlin Schneider at (949) 764-7209 or Carlin.Schneider@hoag.org.



Hoag Summer Classic

Endless

SUMMER

Nights

For 28 years, the Hoag Summer Classic has gathered hundreds of friends of Hoag for fun and fellowship. This year, Endless Summer Nights was the theme at the Newport Dunes on June 24. Hosted by the Hoag Hospital Foundation and the 552 Club, the sold-out event raised approximately \$133,000 to support world-class care at Hoag.

The live music began with Saga Strings and The Long Run, an Eagles tribute band, closed the evening. Guests competed in a raffle that included gift packages from participating restaurants and the grand prize of a one-year lease of a new 2015 BMW 428i Gran Coupe, courtesy of Sterling BMW.

Jeffrey Brandt, M.D., Ph.D., medical director, Hoag Medical Group, co-chaired the event with 552 Club Board Member, Cindy Kansky. "As a Hoag physician, it touches my heart to see so many friends support the work we are passionate about," said Dr. Brandt.

The Hoag Summer Classic has raised over \$2 million dollars and introduced a number of new friends to Hoag since its inception in 1988.

To see additional photos from the event, please visit
<http://facebook.com/hoaghospitalfoundation>



A Big Thank You to Our Generous Restaurant Partners!

Hoag Summer Classic restaurant partners, many of whom have been loyal participants for many years, offered everything from crab cakes and short ribs to handmade crepes, as well as margaritas, wine and artisanal beers. We offer our deep appreciation to:

- A Restaurant
- Back Bay Bistro
- Bluewater Grill
- Boudin Bakery & Catering
- The Bungalow
- Caliente Grille & Catering
- Canaletto Ristorante Veneto
- Club Detox
- DP Catering
- Gabbi's Mexican Kitchen
- Harborside
- Hi-Time Wine Cellars
- Ho Sum Bistro
- Justin Vineyards & Winery
- Kéan Coffee
- La Cuisine Culinary Arts
- Maggiano's at South Coast Plaza
- Newport Beach Firefighters' Association
- Newport Landing
- Nothing Bundt Cakes
- Orange Coast Winery
- Piper-Heidsieck
- Pita Jungle Bistro
- Rasta Rita
- Red O
- Royal Thai Cuisine
- Sabatino's Lido Sausage Company
- San Simeon Wines
- Santa Monica Seafood
- Turnip Rose Catering
- Wine Gallery & Schroeder Family Wines
- The Winery Restaurant & Wine Bar
- Straub Distributing

Remembering Barbara Trotter, R.N.

Fellow Employees Were Her “Hoag Family”

Nurse Barbara Trotter met her husband James at a hospital in Everett, Washington, when he came in with appendicitis. He'd just been discharged from the US Navy. She loved his blue eyes enough to ignore the nursing school edict to never become involved with a patient.

Married in 1949, the couple moved to Orange County in 1950 to help his parents at Trotter's Bakery in Laguna Beach. Barbara began work at Santa Ana Memorial, one of the few hospitals open at that time in Orange County. Her commute was an arduous one. Without freeways, she made the drive from their home in Laguna Beach to Santa Ana on surface streets.

Barbara was thrilled to discover that a new hospital was opening in Newport Beach. In 1952, she became one of the first nurses hired to attend patients at the 75-bed facility. Driving up Pacific Coast Highway to the hospital on the hill was a pleasure. Barbara remembered the dirt roads that led to Hoag in those first days, and the fact that there was nothing around the hospital.

Barbara and James welcomed their daughter Debby in 1950. She was the first child in a succession of six children who would bless the family between 1950 and 1967. When their second child Bill was born in 1954, work became too much to juggle with two small children at home. Barbara left Hoag to turn her attention to motherhood. But the hospital never left her affections. As soon as her youngest child Tom entered school, Barbara went back.

She was needed in the Emergency Room. Barbara



Barbara Trotter, R.N., is pictured on the left with a nursing colleague.

loved the variety, the excitement, and the people she met there. Leaving her busy home life every evening once all the children were tucked in bed, Barbara worked the graveyard shift, starting work at 11 p.m. and ending her shift at 7 a.m. She called her time in the ER her “therapy.”

Barbara relished the training she took to become one of the first Paramedic Nurses at Hoag. She talked to

medics on the phone when they arrived at the scenes of accidents and other medical incidents, helped decide on courses of treatment, and then followed up with those same cases when the patients arrived in the ER.

A consummate care-giver, Barbara nursed her patients at work, and nursed her husband James through a couple dozen or more surgeries of various types. She also cared for her mother for 17 years, after she moved in with Barbara and James in Costa Mesa.

By the time Barbara retired in 1992, she had logged 32 years as a Hoag nurse. An active retiree, Barbara loved garage sales and travel and was able to do a lot of both. As good as life was, Barbara never stopped loving Hoag Hospital. Her “home family” got to know her “Hoag family” through her stories and anecdotes.

Barbara passed away on May 15, 2015 at Hoag Hospital Newport Beach. Her memory lives on at the hospital, where she can be seen in the mural on the first floor by the west wing elevators. In the photo of two nurses sitting on a railing (seen above), Barbara is on the left, smiling widely – happy to be at Hoag.

Keeping Your Brain

Vital

Orange County Vital Brain Aging Program Celebrates Five Years as a Significant Community Resource

Friends of the Orange County Vital Brain Aging Program (OCVBAP) recently gathered to celebrate its fifth anniversary. OCVBAP has established itself as an educational powerhouse that is actively helping Orange County's aging population to maintain and improve cognitive health.

Supported by UniHealth Foundation and philanthropy from the family of Hoag donors, OCVBAP has made great strides in:

- Patient and community education
- Physician training and engagement
- Creating tools to improve cognition and brain vitality

William R. Shankle, M.D., the Judy & Richard Voltmer Endowed Chair and director of Memory and Cognitive Disorders, Hoag's Neurosciences Institute, says that people can prevent dementia or delay it for many years.

"Currently, 12 million Americans have mild cognitive impairment that will become disabling in an average of seven years if nothing is done," he says. "We now know that cognitive impairment due to these conditions can be prevented. We must take action now."

According to Dr. Shankle, ninety percent of all persons with cognitive impairment have a treatable condition. Forty-five percent have a chronic condition that requires better management and 45 percent have Alzheimer's disease. He stresses that Alzheimer's disease can be delayed for years through combined treatment including medication, regular physical exercise, mentally stimulating activity and social interaction.

"Cognitive impairment can be detected before it affects you in any way, so that you can maximally preserve your brain," he stresses. "The key to such detection is to get an annual assessment and monitor changes just like we monitor our cholesterol. OCVBAP and our engaged physicians are well equipped to do this."

Early Detection is Key

OCVBAP has educated over 7,000 public attendees through joint programs with the Alzheimer's Family Services Center, Council on Aging, Bower's Museum, Pacific Symphony Youth Orchestra and Chuck Jones Center for Creativity.

OCVBAP has educated and trained 1,000 primary care physicians and specialists. OCVBAP's cognitive assessment tools have evaluated nearly 19,000 people, through OCVBAP's cognitive assessment service or through OCVBAP-educated physicians. Regardless of the test result, patients feel relieved because they know something can be done to protect and optimize their brain health.

OCVBAP's next task is to expand in Orange County and to reach physicians and public audiences nationwide. Finding ways to increase the use of objective, sensitive measures of cognition will have enormous impact on brain health and quality of life by preventing and delaying dementia.

If you would like more information on how you can help OCVBAP continue its mission to prevent and delay dementia, contact Stacy Hunt at (949) 764-7210 or Stacy.Hunt@hoag.org.



*Allyson Brooks, M.D., Ginny Ueberroth Executive Medical Director
Endowed Chair, Women's Health Institute at Hoag*

Physicians Who Inspire Philanthropy

At Hoag, we are privileged to have extraordinary physicians who are not just leaders in their areas of expertise, but who are dedicated healers. In this new column, we will celebrate the special bond between Hoag physicians who deliver compassionate care and their patients who are moved to support their work through philanthropy.

Keeping Patients Healthy in Body and Spirit

Eve Blackwood first met Allyson Brooks, M.D., Ginny Ueberroth Executive Medical Director Endowed Chair, Women's Health Institute at Hoag, as a patient more than ten years ago. From the first moment they met, she felt comfortable and at ease. But she particularly remembers an appointment after she had lost her mother that changed their relationship forever.

"She could tell I wasn't in a good place and she asked me about it," Mrs. Blackwood recalls. "She really listened; and when I returned a year later, she followed up again."

Even though she moved to San Diego, Mrs. Blackwood continued to see Dr. Brooks because she felt she was treated like more than a patient. Dr. Brooks took the time to listen and make sure Mrs. Blackwood was healthy in both body and spirit.

When Mrs. Blackwood learned of Dr. Brooks' women's health initiative at Hoag, she saw an opportunity to support this important work. "I want to invest in places where women can receive support and advice," she said. "Dr. Brooks is a leader and teacher in how we can live better lives."

When Dr. Brooks received the phone call from the Hoag Hospital Foundation about Mrs. Blackwood's gift, she was flabbergasted at the unexpected generosity.

"I was completely humbled and deeply inspired to rise to the occasion that this type of commitment demands," she says. "I feel like Eve was showing gratitude for the relationship that we have, but at the same time she was also challenging me to do more for the women in our community."



*Burak M. Ozgur, M.D., Chief of Service
Neurosurgery Spine Program at Hoag*

Supporting Outstanding Care in Orange County

When Jerry Jones and his wife Pat learned that she needed cervical disc surgery, they talked to their friends and researched physicians. The more they learned, the more they considered traveling to Germany to get the best outcome for her condition. But, when they spoke with Michael Brant-Zawadzki, M.D., Ron & Sandi Simon Executive Medical Director Endowed Chair at Hoag's Neurosciences Institute and Rick Martin, R.N., M.S.N., Ed.D., senior vice president and chief nursing officer at Hoag, they heard one name: Burak M. Ozgur, M.D., chief of service, Neurosurgery Spine Program at Hoag.

"Dr. Ozgur was very familiar with the procedure we were considering, but he recommended a different course of treatment," Jerry recalls. "Pat felt very confident about his recommendation, and we went to Hoag."

After her surgery, Pat was completely pain free and experienced a very good range of motion. Their experience moved them to support a nurse navigator for Hoag Neurosurgery Spine Program. When Dr. Ozgur learned of their gift, he was honored.

"I find it very fulfilling when a patient feels grateful. When patients choose to support our work, it helps us do more," he says.

The nurse navigator for Hoag Neurosurgery Spine Program effectively narrows the gap between diagnosis and receiving life-changing treatment. The nurse navigator not only assists patients by arranging appointments, he or she helps them quickly access Hoag's resources as well as assists in charting a course through the health care system as a whole.

"When some of my patients first come to me, they can barely walk and do the things that we take for granted," Dr. Ozgur adds. "But when their treatment is efficiently managed, getting them walking and active again, they come back crying tears of joy because their lives have been returned to them."

As a retired healthcare executive, Jerry feels very passionate about the future of innovation and patient outcomes. Gifts like his ensure care resources will continue and improve at Hoag.

"We need to contribute to make sure we have the best health options available with superior care paths here at Hoag," he said. "When Hoag recruits exceptional doctors like Dr. Ozgur, we will keep outstanding care in our region."

Charitable Gift Planning Menu

If Your Goal Is To:	Ask Us About:	And Consider This:
<ul style="list-style-type: none"> Keep control of your assets throughout your life Avoid estate taxation Leave a philanthropic legacy 	Bequest	You can create a bequest through your will or trust stating a specific amount or percent of your estate, or by changing the beneficiary on a life insurance policy, annuity or retirement account.
<ul style="list-style-type: none"> Exchange low yielding assets for a fixed lifetime income, partially tax-exempt Generate a current income tax deduction 	Charitable Gift Annuity	Income can begin immediately or be deferred to a later date when payments received are larger.
<ul style="list-style-type: none"> Retain the right to live in your residence for life Use the equity in your home to generate additional retirement income 	Life Estate Agreement Plus Charitable Gift Annuity	If your situation changes, you can rent the property to others OR exchange your life estate for cash or annuity income.
<ul style="list-style-type: none"> Receive lifetime income with potential for growth Avoid capital gains tax at sale of appreciated asset: real estate, stocks and mutual funds Generate a current income tax deduction 	Charitable Remainder Unitrust	Year-to-year income varies with trust performance. Flexible design allows full income distributions immediately or minimum distributions at the start and increased cash flow at a future date.
<ul style="list-style-type: none"> Assure your philanthropic legacy lives forever Fund long-term programs, carrying family name and/or causes through the generations 	Endowment Gift	An endowment can be funded outright or by a multi-year pledge, bequest or designated remainder from either a trust (CRT) or annuity (CGA).
<ul style="list-style-type: none"> Transfer assets to children or grandchildren over time while heavily discounting gift or estate taxes Provide annual support to a charity for a term of years 	Charitable Lead Trust	This trust avoids “all the money at once” inheritance. Children/grandchildren receive lump sums deferred for specified terms (5 years, 10 years, etc.).
<ul style="list-style-type: none"> Have a predictable, fixed income not subject to market fluctuations Avoid capital gains tax at sale 	Charitable Remainder Annuity Trust	Fixed income for life or set term of years (5, 10, 15 or 20) for short-term needs such as early retirement (first 10 years until Social Security/Pension starts) or college funding for heirs.
<ul style="list-style-type: none"> Gift a life insurance policy which is no longer needed Maximize the size of your testamentary charitable legacy 	Gift of Life Insurance	You can gift either a paid-up insurance policy or make annual gifts to Hoag to fund the ongoing premiums.
<ul style="list-style-type: none"> Avoid double taxation (income and estate tax) on your IRA balance at death Fund a charitable bequest 	Gift of IRA	Hoag can be a full or part beneficiary of your IRA account. Pending legislation may make lifetime transfers work.
<ul style="list-style-type: none"> Avoid capital gains tax on a sale of stock, mutual funds or real estate Generate tax deduction for full market value See your philanthropy at work 	Outright Gift of an Appreciated Asset	Asset must be held long term (one year plus one day).
<ul style="list-style-type: none"> Sell appreciated real estate for both cash and income Generate a tax deduction to offset initial gain on cash portion Defer taxation on balance using installment sale treatment 	Installment Bargain Sale	This technique may be the best for indebted real estate.

Bob and Ann McLean Investing in Hoag

When it came time to plan their estate, Bob and Ann McLean had a decision to make. They knew that philanthropy would be an important part of their estate plan. As they considered the options, their choice became clear. “Our community would be at a tremendous loss without Hoag,” shares Bob. “We invested in Hoag because we’ve used it. This was a way to say ‘Thank you’ and we really do appreciate what we have here.”

The couple, who directed a major estate gift to the Jeffrey M. Carlton Heart & Vascular Institute, is glad to know that their legacy will touch the lives of others. “We hope these funds will help the next person that comes along with a heart attack or other problem,” says Ann. “Improvements are coming along quickly, and it’s exciting to know that we are helping Hoag keep up with the advances.”

An Educated Opinion

Bob and Ann moved to Corona del Mar in the 1960s when Bob took a job as administrator at Huntington Intercommunity Hospital in Huntington Beach, CA. Over the years, Bob has served as CEO and administrator for many hospitals. He’s also semi-retired from RC McLean & Associates, a billing and management service for anesthesiologists and other specialists that he launched in 1983.

Having built and staffed hospitals, Bob shares that Hoag is truly special. “I’ve never seen another hospital like Hoag,” he muses. “The nursing at Hoag



is more impressive than any hospital I’ve been affiliated with. And, it’s not just the nurses. It’s everyone you come in contact with, from the technicians to the lab to the food service staff. An attitude of service and caring is a pervasive thread that runs through the organization.”

Having had direct experience as a patient, and having spent time at Bob’s side when he was a patient, Ann concurs. “We’ve both been incredibly well taken care of by everyone at Hoag,” she says. “We get the sense that the staff is very proud to be at Hoag and that everyone wants to live up to the Hoag culture.”

Giving with a Purpose

Having been affiliated with Hoag for many years through the 552 Club and as volunteers for events over the years, Bob and Ann like the fact that they can direct their gift. “I like to know that the funds are going to a specific purpose,” shares Ann. Bob adds with a laugh, “The Jeffrey M. Carlton Heart & Vascular Institute looks like something out of *Star Wars*. We decided that this is what we wanted to help build.”

In gratitude and appreciation for their \$1 million estate gift, Hoag named the Robert & Ann McLean South Lobby adjacent to the entrance of Jeffrey M. Carlton Heart & Vascular Institute.

If you would like more information about Gift Planning, please contact Julie Heggeness at (949) 764-7206 or Julie.Heggeness@hoag.org.

Reflections from Flynn:

To Our Hoag Promise Campaign Donors and Volunteers

Thank you from a Grateful Community

The official launch of Hoag Promise, Our Campaign to Lead, Innovate and Transform, is right around the corner. You've never seen anything like this before from Hoag. For the first time in our history, the entire organization came together to collectively identify ways to use philanthropy to accelerate innovation across the organization.

This is a big vision. It will take an unprecedented collaboration between Hoag clinical leaders, our ever-growing donor community and our team of volunteer leaders. I'm very pleased to say that the 'can-do' spirit of the original community leaders who built Hoag, which you can read about in the cover story of this issue of *Scanner*, is very much alive more than a half century later.

As we approach what is the most comprehensive campaign in Hoag's history, I'm moved by the generosity of the visionary donors and volunteer leaders who are drawn to give back to our community by supporting the work of Hoag. Our community has been blessed for over 60 years by the commitment and dedication of Hoag's founding family. Even as we go to print, the George Hoag Family Foundation is continuing to look for ways to advance Hoag's mission.

In the run up to the campaign, several visionary donors have stepped in to make lead gifts. As a result, the Hoag Promise Campaign is already funding new programs and advancing existing ones. We look forward to honoring and recognizing each of these generous supporters during and after the official campaign launch. Of

equal importance to financial support is volunteer leadership. The participation and dedication of the more than 300 campaign volunteer leaders adds exponentially to the success of the Hoag Promise Campaign.

Our working fundraising goal of \$500 million has been the rallying point for everyone involved. During the public launch on September 26, we will announce the final goal, a number that reflects the past and present partnership as well as the anticipated future commitment of the communities we serve.

In moving forward, we must acknowledge and express our gratitude to all who supported Renaissance Hoag, the precursor to the Hoag Promise Campaign. Renaissance Hoag allowed the organization to test a fundraising approach with a larger scope than previous fundraising efforts, which were more narrowly focused. Renaissance Hoag led to the discovery that Hoag was ready for a comprehensive campaign encompassing the entire organization. It allowed us to dream bigger. The \$127 million raised by Renaissance Hoag became the platform on which the Hoag Promise Campaign is built.

Please join me in extending our deepest thanks to the passionate donors and volunteer leaders who are coming together to support the Hoag Promise Campaign. Their collective vision and commitment will be Hoag's bridge between good and exceptional.

Flynn A. Andrizzi, Ph.D.
President, Hoag Hospital Foundation
Senior Vice President, Hoag



Hoag Hospital Foundation

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FOR MORE INFORMATION:

Contact Jennifer Garner at Hoag Hospital Foundation at (949) 764-7211 or Jennifer.Garner@hoag.org