

A Hoag Hospital Foundation Publication

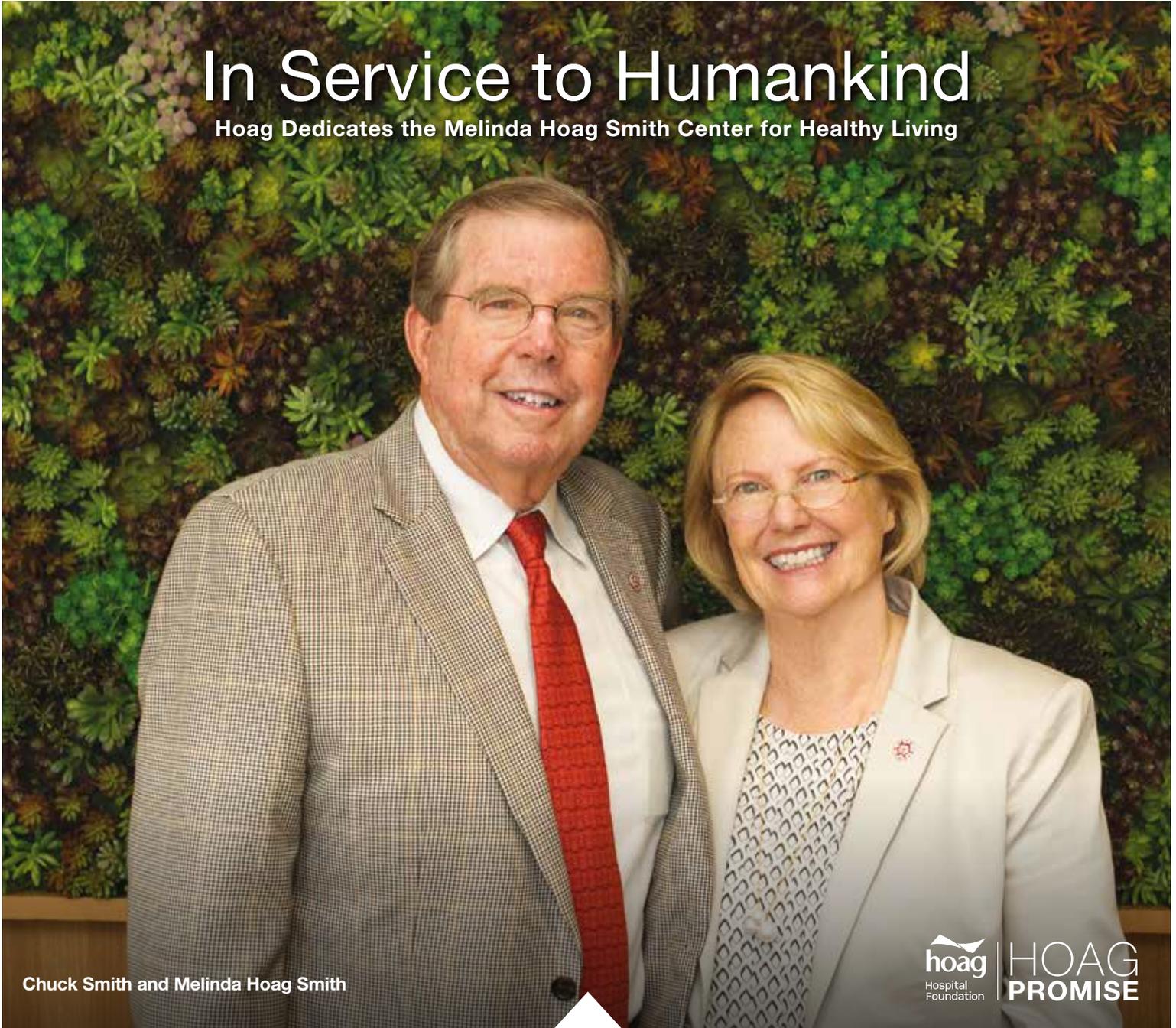
SCANNER

SPRING EDITION

2016

In Service to Humankind

Hoag Dedicates the Melinda Hoag Smith Center for Healthy Living



Chuck Smith and Melinda Hoag Smith



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LETTER FROM THE CHAIR

Dear Friends of Hoag:

The public launch of Hoag Promise, Our Campaign to Lead, Innovate & Transform, unleashed a powerful force of community collaboration and support that will impact Orange County for years to come. In this issue of *Scanner*, we will highlight some of the gains community support is making possible.

Orange County has always been a place where we care for each other and nothing symbolizes that commitment more than the Melinda Hoag Smith Center for Healthy Living. We are so deeply grateful that Chuck and Melinda Smith are continuing the Hoag family legacy of supporting community health and well-being. You will read about how their most recent gift is allowing Hoag to create a centralized hub for non-profit organizations that provide essential services at low to no cost to underserved families.

I am very excited to celebrate 2016 as the 50th Anniversary of the 552 Club. The original idea was to collect \$100 in annual dues from each member to support the hospital's goal of expanding to 552 beds. At the time, response was slow until Hoag's neighbor John Wayne reportedly told his financial manager, "Write these guys a check for \$2,500."

This group of dedicated philanthropists and volunteers went on to establish our much beloved Christmas Carol Ball. How proud they would be to know that the 49th Annual Christmas Carol Ball not only broke attendance records, but also raised a record \$1.5 million for Hoag. We have Fariborz and Azam Maseeh to thank for their vision and leadership as chairs of the 2015 Christmas Carol Ball.

With you, I am privileged to be part of a legacy of generosity that has placed Hoag on the forefront of advanced care, even as the needs of Orange County have grown exponentially. Whether I drive by Hoag Hospital Newport Beach or Hoag Hospital Irvine, or one of our health centers throughout Orange County, I can't help but feel a personal sense of pride in what we have accomplished and what is yet to be accomplished.

Sincerely,



Cindy Stokke
Chair, Hoag Hospital Foundation Board



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COVER STORY

In Service to Humankind

Hoag Dedicates the Melinda Hoag Smith Center for Healthy Living

During the public kickoff of the Hoag Promise Campaign in September, we were very pleased to announce a \$5 million gift from our namesake family, the George Hoag Family Foundation. Directed to Hoag Community Benefit Program, the gift is being used to significantly expand life-changing health and wellness programs and services provided to the community. In recognition and gratitude, Hoag named the Melinda Hoag Smith Center for Healthy Living.

Located on the Newport Beach campus, the Melinda Hoag Smith Center for Healthy Living is a unique collaborative endeavor bringing together many of Orange County's leading providers of health, mental and spiritual services to underserved individuals and families. All under one roof and working together collaboratively ensures synergies and shared resources among the agencies as well as a better experience for the individuals and families served.

"I can't think of another outcome I want more than health and wellness for everyone who walks in the doors."

~Melinda Hoag Smith

"I see the Melinda Hoag Smith Center for Healthy Living as a unique opportunity to address several community needs in one location," says Melinda, whose father, George Hoag II, established the George Hoag Family Foundation with his parents, Grace and George Hoag Sr. "The level of accessibility of key services, from pediatric dentistry to chemical dependency and mental health, is very closely aligned with the George Hoag Family Foundation's 75-year mission to serve the most vulnerable by improving social conditions and promoting human welfare."

On Wednesday, May 11, Hoag Hospital Foundation held a dedication ceremony in celebration of the official naming, during which new signage was unveiled. Much more than that, it was a celebration of the commitment of the George Hoag Family Foundation to helping others.



MELINDA HOAG SMITH
CENTER FOR HEALTHY LIVING





Together We Can

The Melinda Hoag Smith Center for Healthy Living partners with an impressive number of organizations that provide a comprehensive range of health and wellness services. They include:

- Costa Mesa Family Resource Center
- National Alliance on Mental Illness (NAMI)
- Public Law Center
- Orange County Public Health Nursing
- Susan G. Komen Orange County®
- YWCA
- Clinic in the Park
- Be the Change Yoga
- Council on Aging
- Alzheimer's Association
- SOS – Children and Family Health Center
- SOS – Dr. Robert & Dorothy Beauchamp Children & Family Dental Center
- ASPIRE – Hoag Neurobehavioral Health
- Hoag Mental Health Center
- Hoag Pastoral Care

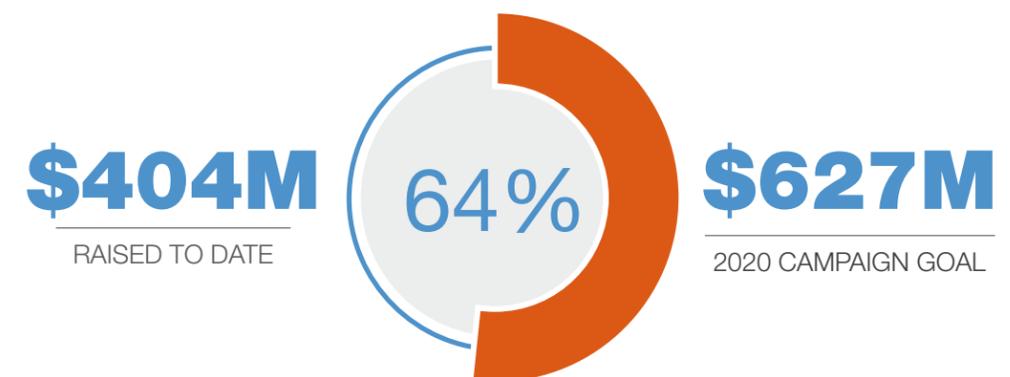
HOAG PROMISE

Campaign Progress Report

By supporting Hoag Promise, Our Campaign to Lead, Innovate & Transform, community members are collaborating with us to drive Hoag's continued clinical leadership, innovative spirit and transformative potential. For more information about Hoag Promise, visit www.HoagPromise.org.

Campaign Progress to Date

Campaign duration: 2010 – 2020



Featured Giving Opportunity:

HOAG FAMILY CANCER INSTITUTE Developmental Therapeutics Program

For patients whose cancer has not responded to standard treatments, or who have advanced disease, a drug in an early-phase clinical trial may offer new hope and healing. Traditionally, these early-phase “developmental therapeutic agents” are available on a very limited basis and only in specialized cancer centers.

Hoag Family Cancer Institute's exceptional reputation, as well as its alliance with USC Norris Comprehensive Cancer Center, positions it perfectly to develop a program that offers promising new therapeutic agents to our community before they are widely available. That means patients will have access to personalized treatment specific to the genomic profile of their individual tumors without leaving our community.

With the first trial beginning this spring, philanthropic support will be crucial in continuing implementation and ongoing sustainability. Funds will be used in the following ways:

- Closing the gap on the cost of clinical trials and reimbursement
- Upgrading clinical patient space in the Patty & George Hoag Cancer Center for the Phase I and Phase 2 Clinical Trials Unit and acquiring the necessary equipment
- Recruiting a specialized team

We are grateful to Marianne and Jim Nahin whose \$150,000 Nahin Family Cancer Center Fund is being used to start the ball rolling. For more information on how you can support the Developmental Therapeutics Program at Hoag Family Cancer Institute, contact Carlin Kuhlmann at (949) 764-7209 or Carlin.Kuhlmann@hoag.org.

RECOGNITION



Happy Anniversary 552 Club!

Celebrating 50 Years of Raising Friends and Funds for Hoag

In 1966, the Hoag Memorial Hospital Presbyterian board of directors knew that the 75-bed community hospital, which had served coastal Orange County for 14 years, would soon be too small to meet the needs of a growing community. Hoag would need to expand to continue to be a relevant community resource. They made the decision to build a 10-story tower to accommodate additional services and patient rooms.

A group of concerned community leaders accepted the challenge of developing a plan to build community awareness of, and financial and

volunteer support for, Hoag's mission. After learning more about the hospital's plans, the group formed the 552 Club, named for Hoag's goal at that time of expanding to 552 beds. Active "membership" was granted to those who made a minimum annual contribution of \$100. The idea took hold and the rest is history.

Over the years, this community-based group of volunteers and donors was a magnet for drawing support for Hoag. 552 Club volunteers planned a variety of social and sporting events to raise friends and funds for Hoag including the Toshiba Classic

Golf Tournament, the Movie Screening event and the Christmas Carol Ball. As a result, the 552 Club has raised funds for every significant initiative undertaken by Hoag over the ensuing years.

Today's 552 Club is as vital as ever. Now, everyone who makes a \$100 donation or more each year is considered part of the 552 Club family of donors. The 552 Club is served by a passionate board and several volunteer committees that honor the traditions of the founders even as they find new ways to add value.

We recognize and celebrate the rich history and heritage of the 552 Club. We thank the long line of committed 552 Club volunteers and volunteer leaders for their steadfast and enthusiastic dedication to ensuring Orange County has the best care available anywhere.

We congratulate every 552 Club donor who has supported the success of Hoag for 50 years and counting!



552 Club Vintage Photo Sharing

We hope you enjoyed this photo montage of days gone by. If you have any vintage photos from 552 Club events, we would love to share them online. Contact Deb McCune at (949) 764-1884 or Deb.McCune@hoag.org.

ENDOWED CHAIR

Forward Motion

Dr. James Caillouette, Joan & Andy Fimiano Endowed Chair in Orthopedic Surgery, Continually Innovates to Keep Patients Moving

James T. Caillouette, M.D., Joan & Andy Fimiano Endowed Chair in Orthopedic Surgery, has a saying he shares with patients. Motion is life. Those words

not only define his work as an orthopedic surgeon who restores mobility to his patients, they fuel his personal mission to innovate the technology and delivery of orthopedic care.

After 28 years at Hoag, Dr. Caillouette remembers that when he first

joined the staff, Hoag saw less than 200 joint replacements a year. "Today, Hoag Orthopedic Institute performs thousands of joint replacements each year," he says. "I've had an opportunity to participate, along with my colleagues, in growing this institution and it has been very rewarding."

Andy and Joan Fimiano, who were both treated several years ago by Dr. Caillouette, established the endowed chair to recognize and honor the physician for his work in health care economics and reform, along with the design of next-generation hip and knee implants. "The goal of our gift is to enable Dr. Caillouette to share his expertise so that it benefits more people. Basically, we need to clone him," Joan says with a smile.

The proceeds from the endowed chair will enable Dr. Caillouette, chief strategy officer of Hoag Orthopedic Institute, to expand outreach, education, research and innovation. The Fimiano's generosity gives him and his team the opportunity to introduce more process innovations such as bundled payment, a new payment model Hoag Orthopedics introduced in 2008. With proven success, Medicare adopted this payment system for total hip and knee replacement. It is anticipated that bundled payment will ultimately be applied to most interventional specialties.

For their part, the Fimianos are very pleased to support Dr. Caillouette and his important work. "We are so grateful to have the opportunity to recognize Dr. Caillouette, one of the finest orthopedic surgeons in the region," Andy says. "Joan and I know Dr. Caillouette will use his endowed chair as a platform for expanding his research and recruitment and, most important of all, for improving treatment and outcomes for Hoag's patients."



PHYSICIAN PHILANTHROPY

Healers Who Give

Physician Leaders at Hoag Orthopedics Open Doors to the Future Through Giving and Service

Hoag Orthopedics physicians have collectively made more than \$680,000 in gifts to develop a self-sustaining institute that continually drives improvements in patient care, research, education and innovation. In fact, more than half of Hoag's orthopedic physicians contribute financially or through service to community outreach programs, all of which have contributed to its national reputation for excellence.

"When Hoag Orthopedics opened five years ago, we were not only given a great playground for innovation, but we orthopedic surgeons were also given an unprecedented opportunity to build it," says Alan Beyer, M.D., executive medical director of Hoag Orthopedic Institute. "We were eager to give back."

Carlos Prietto, M.D., president of Hoag Orthopedic Institute, adds that physician philanthropists at Hoag enjoy the unique opportunity to



Dr. Alan Beyer, first Hoag physician recognized as a Hoag Benefactor for his cumulative donations, shown here with a grateful patient.

Ushering in the Future

What really excites them is looking ahead. "The future of medicine is possible today with clinical trials and research partnerships funded entirely by philanthropy," says Dr. Beyer, who is the first Hoag physician recognized as a Hoag Benefactor for his cumulative donations.

Currently, Hoag Orthopedics physicians are collecting DNA data to study patient sensitivity to pain and how patients metabolize pain medication.

This clinical trial has the potential to seismically shift the way surgeons strategize patient diagnosis and treatment.

"This is breakthrough technology. When we're long gone, our young partners will be using this as part of their everyday practice," says Dr. Beyer.

Both Drs. Beyer and Prietto look back to their early mentors whose generosity and humility inspire them in the education of the new generation. What makes it particularly exciting for them is that through philanthropy, the future of medicine is already happening at Hoag.

be directly involved in the development, organization, budgeting and direction of research and education. "Many of us want to leave a legacy that will stand for many years to come and continue to drive a high level of orthopedic care to Orange County," he says. "There's a sense of ownership when you actively participate and financially contribute to these initiatives."

As a result, physicians have seen the tangible results of their generosity in everything from the dramatic decrease in readmissions due to infection, to the fifty percent increase in applicants to Sports Medicine, Total Joint Arthroplasty and Spine-Surgery Fellowship programs.

EVENTS

We Are All Touched

29th Annual Circle 1000 Founders' Celebration Brunch

The Circle 1000 Committee hosted its 29th Annual Founders' Celebration Brunch on May 9, 2016, raising \$840,000 for cancer care at Hoag. 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.

"We are all touched by this disease and, as a member of Circle 1000 for more than 20 years, I'm proud that we have not only contributed to the growth of Hoag Family Cancer Institute, but that we have supported programs that help so many thrive after cancer," said Sheryl Anderson, chair. "Every year, my heart is deeply touched when we ask cancer survivors and caretakers to stand and be acknowledged. You can see that cancer does not discriminate and we have more work ahead of us to heal our family, friends and community."

Keynote speaker Shannon Miller is the only American to rank among the top 10 of all-time gymnasts and the only female athlete to be inducted into the US Olympic Hall of Fame twice. In 2011, Shannon was diagnosed with a rare form of ovarian cancer. She is currently cancer free

and continues to advocate for early detection. Shannon recently released her new book, *It's Not About Perfect: Competing for My Country and Fighting for My Life*.

"We cannot adequately describe the impact Circle 1000 has made on Hoag's standing as one of the top cancer institutions in Orange County," said Flynn A. Andrizzi, Ph.D., president, Hoag Hospital Foundation. "This extraordinary group of women has made it possible for Hoag to launch the Melanoma and Advanced Skin Cancer Program in alliance with USC Norris Comprehensive Cancer Center. Their dedication has also greatly contributed to the nurse navigator program and the availability of nursing scholarships as well as staff training and cancer research. Circle 1000 is a wonderful example of visionary philanthropy at work for the community."

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



Circle 1000
Hoag Family Cancer Institute



EVENTS



YOU ARE THE MAGIC

22nd Annual Hoag Heritage Society Luncheon

Rabbits, chicks and doves appeared out of thin air during the wondrous magic show at the 22nd Annual Hoag Heritage Society Luncheon in March. The Hoag Hospital Foundation honored planned giving donors for ensuring that the Hoag Promise will burn just as brightly in the future as it does today. Sharon and Terry Bridges shared their personal story of hope and second chances, which motivated them to make a generous gift annuity to Hoag.

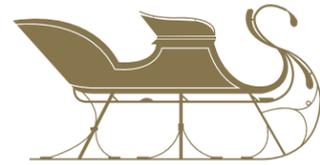
“Planned gifts make a positive impact on Hoag today and in the future,” said Julie Heggeness, executive director of Gift Planning, Hoag Hospital Foundation. “The Hoag Heritage Society Luncheon allows us the opportunity to celebrate all of the ways philanthropy will help Hoag sustain and grow its services to the community.”

The annual celebration recognizes those who have made gifts to Hoag through a bequest, charitable trust or charitable gift annuity.

For more information about the Hoag Heritage Society, please contact Julie Heggeness at (949) 764-7206 or Julie.Heggeness@hoag.org.



EVENTS



Jingle Bells

HOAG HOSPITAL FOUNDATION RANG IN THE HOLIDAYS
AT THE 49TH ANNUAL CHRISTMAS CAROL BALL

This was the year Hoag Hospital Foundation broke records. Event co-chairs Azam and Fariborz Maseeh proudly congratulated more than 650 guests for selling out the annual celebration and raising an unprecedented \$1.5 million at the 49th Annual Christmas Carol Ball.

“The Christmas Carol Ball is our opportunity to say thanks to Hoag physicians, nurses and staff and to support them with our generosity,” said Fariborz in his opening remarks. “We are pleased to have so many underwriting angels among us. They allow Hoag to provide exceptional care for our brothers and sisters, kids and grandkids, friends and people we will never meet.”

Guests engaged in an exciting live auction which included a private party and premiere screening of *Star Wars: The Force Awakens* at the Port Theater and a luxurious Las Vegas getaway with

a flight on NetJets and two-night stay in an Encore Tower Suite, both donated by event co-chairs Azam and Fariborz Maseeh. Also included was an in-home dinner donated and prepared by Chef Azmin Ghahreman, owner of Sapphire Laguna Restaurant and The Pantry.

The “Bid For A Cause” silent auction featured opportunities for guests to make smaller donations that have a mighty impact for Hoag.

“The record-breaking event was no accident,” said Flynn A. Andrizzi, Ph.D., Hoag Hospital Foundation president. “The support of this event was extraordinary in no small part because of the vision, commitment and hard work of Christmas Carol Ball co-chairs, Azam and Fariborz. They set out to break the record and then did everything possible to meet that goal. We are grateful to them and to all of the generous donors who stepped forward to support Hoag.”



GIFT PLANNING

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 that is 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.

GIFT PLANNING

Laughing At Her Luck

Evelyn Hart Gives Back with a Grateful Heart

Evelyn Hart will be the first person to tell you she is the luckiest woman in Newport Beach. She counts her health, her family and friends, her beach house and her community on her gratitude list. Over the years, she has given much to the city that has blessed her with such a wonderful life.

She moved to Newport Beach in 1951 with her husband John. They worked side by side in the family business, Hart's Sporting Goods, located at Newport and Harbor Boulevards. "Everyone came to Hart's," she says. "Every now and then we run into old customers who tell us they still have the things they bought from us back in the day."

After twenty years in business, Evelyn and John closed Hart's. She had been involved with the City of Newport Beach Parks, Beaches & Recreation Commission, establishing the bike trails in the coastal areas and Irvine. In 1978, she decided to run for city council and, with the support of family and friends, she won a seat. For 16 years, including two as mayor, Evelyn stewarded the growth of Newport Beach.

"I've seen great changes here in Newport Beach, but one thing has remained the same," she says. "Hoag has always been here."

Two of her children were born at Hoag. Evelyn volunteered at the Hoag thrift store and worked on the hospital's call-waiting line. She was a long-time member of the Hoag Auxiliary and today, at the age of 85, remains active with the Oasis Senior Center in Corona del Mar. When she's not attending board meetings around town, Evelyn and John are on their boat or gardening.

Stepping Up

Evelyn is forever grateful for the care and support she and her family have received from the physicians, nurses, staff and volunteers at Hoag over the years.

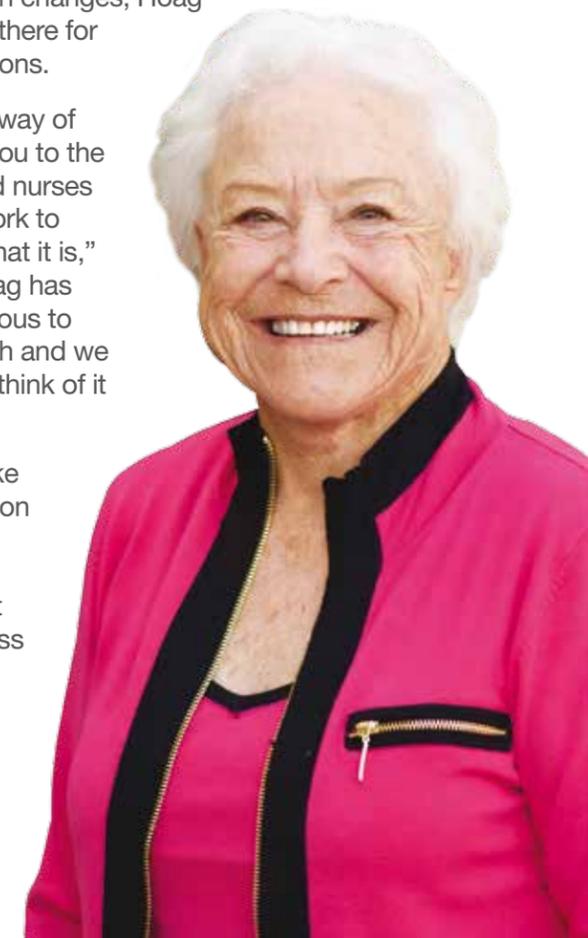
The advanced treatment from Hoag's Neurosciences Institute has kept her active and involved with life.

She credits Dr. Gwyn Parry, director of Hoag Community Benefit Program, and Flynn A. Andrizzi, Ph.D., president, Hoag Hospital Foundation, with providing philanthropic guidance. "When the Friends of the Oasis Senior Center needed to raise funds for a new building and transportation, they stepped right up and helped us," she says. "Dr. Andrizzi attends our meetings and helped us to get organized so we could meet the needs of our seniors."

Evelyn and John decided to name Hoag as a beneficiary of their trust so that no matter how much Newport Beach changes, Hoag will always be there for future generations.

"My gift is my way of saying thank you to the physicians and nurses and all who work to make Hoag what it is," she says. "Hoag has been so generous to Newport Beach and we can't help but think of it as our place."

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



MESSAGE FROM THE PRESIDENT

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



We All Have A Role in Hoag's Future

I'm pleased to report that the momentum of the Hoag Promise Campaign is exceeding our expectations. Passionate and committed donors are answering the call to support Hoag's renowned nurses and physicians in providing leading-edge care.

For 66 years, the generosity and philanthropic leadership of the Hoag family has sustained and grown Hoag programs that were often the very first of their kind in Orange County. The Hoag family once again made a groundbreaking gift that you can read about in greater detail in our cover story. The \$5 million the family committed to establish the Melinda Hoag Smith Center for Healthy Living will significantly impact access to care for the underserved.

The Hoag family is among a very special group of philanthropists who do more than support Hoag. They are partnering with us to visualize Hoag's future and support its success on behalf of the communities we serve. We greatly value their expertise and guidance as we conduct our comprehensive Hoag Promise Campaign, which will lead to an unprecedented elevation and integration of care.

For the Hoag Promise Campaign to truly transform, we all have a role to play. Individuals may give through their actions, contributing their own unique talents as volunteers. Others provide financial support in gratitude to a physician or a nurse who helped them in their time of need. When all of us step up and contribute, we make a direct and

positive impact on Hoag's clinical excellence. We join a generous group that cares for its own, its neighbors and especially for those who wouldn't have any other resource.

This is a group I am pleased to be part of in a time of great challenge and even greater opportunity. Our efforts empower research, and at the same time, evolve medicine so that it is personalized, precise and preventative. Donor and community support will change how patients and families access, receive and manage their care. Together, we will ensure that Hoag will always be there for us and for future generations.

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HOAG SUMMER CLASSIC

Sunset Soirée

Wednesday, June 29, 2016 - 5:00 p.m.

Newport Dunes

1131 Back Bay Drive | Newport Beach

Tastings from more than 30 of Orange County's finest restaurants.

Live Entertainment presented by Lido Live:
Opening Act - The Chicago Experience
Headliner - The Doobie Experience

Identification of guests for alcohol consumption is required at event entrance.

Inquiries: 949.764.7211 or Jennifer.Garner@hoag.org
HoagPromise.org/2016HSC



HOAG
PROMISE



CELEBRATING
50 YEARS
1966 - 2016