A Hoag Hospital Foundation Publication





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LETTER FROM THE CHAIR

Dear Friends of Hoag,

If nothing else, this pandemic has brought to light the true value and importance of access to outstanding, reliable and well-managed health care. Hoag has been nothing short of tremendous in its response to COVID-19. I'm sure it surprises no one that our local leader in care across multiple specialties would also be a leader in treating COVID-19 patients and conducting research of national significance. In fact, Hoag is one of the few sites in the country selected to conduct COVID-19 clinical trials, which are critical in the mission to develop an effective treatment and vaccine.

This doesn't happen by accident. Friends, I'm proud to say that Hoag's philanthropic partnership with our community, with you, has made all the difference in Hoag's ability to respond to the biggest health threat of our generation. In recent months, many among you stepped forward to help Hoag respond to COVID-19 with gifts of all sizes. In our cover story, you'll read more about Hoag's response to the global pandemic and its impact on our community.

In this issue, you'll also learn about groundbreaking cancer research here at Hoag, including a new and exciting pancreatic cancer trial underway at the Hoag Family Cancer Institute. With donor support, Hoag physician leaders are bringing the newest and most advanced treatments to our community.

You'll read about the Hoag Innovators, a philanthropic group that makes a profound impact on innovation at Hoag. I am awestruck by the ingenuity of our health care leaders across all areas of Hoag and deeply grateful for the generosity of Hoag Innovators.

We report on the impact of one of Hoag's longest running philanthropic groups, Circle 1000. The impact their generosity has made on cancer care, research and education for the past 33 years can't be overstated. We look forward to the time when we can once again gather at their annual brunch to celebrate this extraordinary group and their tireless work to support cancer care at Hoag.

Hoag simply wouldn't be what it is today without the spectrum of talent and commitment – from our donors and volunteers to Hoag leaders and its nurses, physicians and staff. All serve with dedication every day and through this unprecedented moment of COVID-19. As we move into the future, Hoag and this community will stand strong together.

Thank you so much for being an important and valued friend of Hoag. As soon as it is safe, I look forward to celebrating all that we have achieved.

Sincerely,

Kathleen M. Armstrong Chair, Hoag Hospital Foundation Board of Directors



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COVER STORY

Donors Rally Around Hoag

The coronavirus crisis has changed a lot about our everyday lives. One thing that hasn't changed — Hoag is there for the community, and our generous donors are there for Hoag.

When the pandemic began, numerous members of the community asked how they could support Hoag's efforts in the fight. Hoag Hospital Foundation established the Hoag COVID-19 Support Fund, which was met with an overwhelming response from corporate and private donors alike. Significant gifts from Kingston Technology, Activision Blizzard and Hoag donor Richard Scudamore kicked off the Hoag COVID-19 fundraising efforts. Together with more than 200 gifts from generous community members, such as Julia and George Argyros, Joan and Andy Fimiano, and Ron and Sandi Simon, Hoag COVID-19 fundraising proceeds exceed \$6 million to date.

The Hoag COVID-19 Support Fund has helped Hoag remain nimble and act swiftly in light of the developing situation. The Fund supports areas of greatest need, including assisting Hoag in providing additional equipment to protect Hoag staff and patients.

Meeting Every Need

Local businesses and individuals are finding other ways to give as well. Many have donated items, such as personal protective equipment.

Mary and Dick Allen and Diane and Michael Stephens made cash gifts allowing patients living with type 1 diabetes and experiencing financial hardship to receive free insulin upon being discharged from Hoag and from Mary & Dick Allen Diabetes Center. These patients require multiple injections of short-acting and long-acting insulin every day to stay alive. The cost of insulin can become staggering in the event of unemployment or job loss.

"We know that needs will grow and evolve as the pandemic continues to unfold," said Hoag President and CEO Robert Braithwaite. "We offer our heart-felt thanks to all of our generous donors for standing by us as we work on behalf of our community. What they may not know is that donor support is a great morale boost to our staff as well as providing tangible resources."

Hoag nurse Cecy O'Berg, BSN, RN, PHN, PCCN, is a testament to this. "Because of our donors, we never have to worry about our supplies of PPE. There is never a question," said Cecy. "Knowing the community is behind us really allows us to focus on delivering the best care for our patients."

"We offer our heartfelt thanks to all of our generous donors for standing by us as we work on behalf of our community. Donor support is a great morale boost to our staff as well as providing tangible resources."

~Robert Braithwaite Hoag President and CEO

How You Can Help

Members of the community are welcome to make a gift of any amount to the Hoag COVID-19 Support Fund by visiting covid19.hoagpromise.org.



Hope for Today and Tomorrow

Donor Support Positions Hoag to Conduct COVID-19 Testing and Research

Thanks to the support of our donors, Hoag's Center for Research and Education (HCRE) has emerged as a leader in clinical research. As a result, Hoag is on a short and elite list of health care systems with the infrastructure in place to conduct clinical trials of various drugs and other interventions for COVID-19:

- Hoag was one of the top trial sites for the Gilead antiviral drug remdesivir. Our findings contributed to the FDA's rapid approval for emergency use.
- Hoag is currently participating in the Mayo Clinic convalescent plasma trial and community-focused testing trials.
- Hoag has launched an antibody testing trial focused on our own health care workers to increase understanding of COVID-19 immunity.
- HCRE is in the pre-clinical stage with a local drug company of deploying a COVID-19 vaccine.

As Medical Director of Infection Prevention and Hospital Epidemiology at Hoag, Philip Robinson, MD, FIDSA, is leading the COVID-19 response for Hoag. "I and our entire Hoag team are very grateful to our community for supporting us as we conduct our response, including critical testing and research," said Dr. Robinson.

"Past and present donor support has positioned Hoag to contribute in a major way to the regional and nationwide efforts to mitigate COVID-19."

~Philip Robinson, MD, FIDSA Medical Director of Infection Prevention & Hospital Epidemiology

A Special Gift from the Committee of 100

Hoag was one of 30 U.S. hospitals gifted with personal protective equipment from the Committee of 100, a nonprofit U.S. leadership organization of prominent Chinese Americans. Hoag leaders were grateful to receive 490 isolation gowns and 1,200 masks from the revered group.

As Hoag staff work tirelessly for our community, they are cognizant of and very grateful for the

outpouring of support. "Your public commitment to donate personal protective equipment to 30 hospitals is remarkable. We are deeply grateful that Hoag, and our community, will benefit from your generosity," said Hoag President and CEO Robert Braithwaite. "Your giving uplifts and inspires our staff as much as the gowns you donated will shield and protect them."

The concept of founding the Committee came from the late, renowned architect I.M. Pei and Dr. Henry Kissinger, 56th U.S. Secretary of State, in 1988. In 1989, Pei teamed with master cellist Yo-Yo Ma, Henry S. Tang, Oscar Tang, Shirley Young and Chien-Shiung Wu to recruit distinguished Chinese Americans from the arts, business, academia, public service and sciences to serve on the Committee of 100.

HOAG PROMISE

Campaign Update

The Home Stretch

We are in the home stretch of the Hoag Promise Campaign, and our fundraising is still going strong. As we roll toward the Campaign end date of December 31, 2020, we've raised \$705 million to date, surpassing our \$627 million goal.

Despite reaching the overall goal, we still have some work to do to meet and exceed our clinical fundraising priorities within the larger Campaign. Here's a snapshot of what we've raised for each of our Campaign sub-goals:



Campaign Duration: January 1, 2010, to December 31, 2020

HOAG FAMILY CANCER INSTITUTE

Clinical Research Provides Breakthrough Cancer Care Close to Home



More than 80 percent of cancer patients receive care in the community setting, yet treatments based on real-time scientific advances are typically available to patients only at large academic medical centers. For most patients, this kind of care is far from home and difficult to access.

Hoag Family Cancer Institute (HFCI) envisioned something better for our community – an expansive offering of clinical trials that provide Hoag patients access to the very latest in cancer care, all delivered with Hoag's personal and compassionate style. With the most innovative breakthrough treatments available locally, HFCI is the best of both worlds. In the last five years, Hoag Family Cancer Institute has built an extensive cancer clinical research program with over 80 clinical trials currently open.

One of its hallmarks is the Developmental Therapeutics Program — a portfolio of early phase clinical trials (phase I and II) that bring what is new and still evolving in scientific laboratories to the clinical setting. For many patients, especially those with advanced cancer, a novel approach being tested through a clinical trial could offer new hope. Hoag is the first and only community hospital in Orange County to offer early phase trials.

In total, since the Developmental Therapeutics Program began, over 80 phase I and II clinical trials have opened.

In many cases, Hoag is one of a small number of centers in the country where patients can access these emerging treatments. Some clinical trials at Hoag include the most promising applications in immunotherapy — therapies that ignite the patient's immune system to fight cancer – as well as targeted or precision treatments, which apply drugs that target the unique genetic changes driving an individual's cancer. Some of the most innovative cancer research is combining multiple drugs and therapies.

Cancer research is accelerating at an increasingly rapid pace. As new discoveries are translated from the bench to the bedside through clinical trials, Hoag Family Cancer Institute's foresight in building this unique program gives cancer patients in our community every treatment advantage.

Bringing the Best to Hoag

Hoag Family Cancer Institute Recruits Distinguished Expert in Molecular Imaging and Therapeutics



Gary A. Ulaner, MD, PhD, FACNM, joins Hoag Family Cancer Institute from Memorial Sloan Kettering Cancer Center, where he served as the PET/CT expert on the Breast

Cancer Disease Management Team. His background includes education and training at Stanford, Johns Hopkins and USC, dual board certifications in radiology and nuclear medicine and numerous publications in top-rated medical journals.

A physician-scientist, Dr. Ulaner develops molecular imaging agents that target individual cancers. These agents help determine which therapies a patient will best respond to and allow radiotherapy to be directed at individual cancer cells. He is the principal investigator on many important clinical trials in cancer imaging and radiotherapy, including several that are funded by the National Institutes of Health. These trials will continue at Hoag under Dr. Ulaner's leadership.

"There have been tremendous recent advances in cancer therapies which 'target' a specific molecule on the cancer cell. Cancer imaging is now catching up with these advances, and I am so happy to help bring them to the Hoag community," Dr. Ulaner says. "I look forward to working with the team to build a Molecular Imaging and Therapy (MIT) program that can assist patients with many types of cancer."

The program will be the first and only one of its kind in Orange County. To learn more, visit Hoag.org/cancer.

Hoag's Groundbreaking Clinical Trials Change the Course of Pancreatic Cancer Treatment

Pancreatic cancer is often said to be the most lethal of all cancers. With good reason – fewer than 20 percent of those diagnosed live longer than one year. Thanks to donor support, groundbreaking clinical research could change that.

With support from the Seena Magowitz Foundation, Hoag Family Cancer Institute will soon offer a phase 1 clinical trial testing an innovative treatment approach for patients with metastatic, or advanced, pancreatic cancer. The trial combines two immunotherapy drugs that alert the patient's immune system of the invader, then mobilize it to attack. The combination of the two drugs is already a novel approach. The trial takes it a step further by injecting the therapy directly into the patient's tumors using state-of-the-art CT image guidance. Researchers hypothesize that unleashing the therapy in this targeted way will trigger a systemwide message to the immune system to also attack the cancer that has spread to other parts of the body.

Because most pancreatic cancer cases are diagnosed at the advanced stage after it has already spread, treatment options are limited. This new approach could be a game-changer and may have implications for other types of cancer that has spread. The trial, which opened at Hoag in the summer of 2020, will only be available at three sites in the country.



The ability to open a clinical trial with this level of complexity requires specific expertise and a robust clinical research infrastructure. Philanthropic partners like the Seena Magowitz Foundation help make both possible, giving patients in our community access to some of the most promising advances in cancer treatment.



For more information on how you can support bringing the latest advances in cancer treatment to Hoag Family Cancer Institute, contact Gwen Ritter at (949) 764-7209 or Gwen.Ritter@hoag.org.

07-08

HOAG INNOVATORS

Catalyzing Innovation

Striving for innovation is a high priority at Hoag, a goal which requires assistance from those who are equally committed to the progress. Hoag Innovators, a group of like-minded philanthropists, advance this goal by investing in health care innovation at Hoag.

Founded and led by Kitty and Robert Brunswick, former Hoag Hospital Foundation Board Chair, Hoag Innovators is a dedicated group of philanthropists, entrepreneurs and community leaders leveraging the power of collective giving. The group provides funds that support Hoag in acquiring advancements in technologies and implementing innovative programs and services for our vibrant community.

Hoag Innovators gather biannually to learn more about the latest advancements in medicine from Hoag's leading physicians and to consider how to allocate their pooled philanthropic gifts most advantageously. The Hoag Innovators 2020 Spring Meeting confirmed the group is making an impact by catalyzing innovation and advancement at Hoag.

Forward-Thinking Philanthropy

Hoag Innovators fund a variety of vital programs at Hoag. To date, the group has raised \$1,075,000 and distributed those funds to the following programs:

- KODEX-EPD 3D Cardiac Mapping Provides real-time, high-definition images during procedures with unmatched clarity for more precise and personalized arrhythmia treatment.
- **Pacify Application Pilot** Virtual, 24/7 on-demand access to postpartum resources, including lactation consultants, midwives, nutritionists and social workers.
- Invenio NIO Laser Imaging Provides high-quality images in a fraction of the time of traditional methods to allow surgeons to make rapid diagnosis and treatment.
- Klue App Pilot in Gestational Diabetes Uses artificial intelligence to monitor when user is eating or drinking and support healthy choices.

- Leaf Device Implementation in Critical Care Units — Monitoring system to detect movement and prevent pressure injuries to critical care patients.
- Transitional Care Pilot Program Post-discharge home health care and resource coordination to prevent ER visits and hospital readmissions.
- Marfan Syndrome & Related Conditions Program — Recruited renowned physician to lead expert team for patients with rare diseases (only program of its kind in a community hospital in the US).

To help those affected by COVID-19, Hoag Innovators will provide support to Hoag's team of trained infection prevention experts who work on developing leading-edge treatments and robust testing capabilities. Our community, and future generations, will benefit greatly from the generosity and caring of Hoag Innovators' members. For more information on Hoag Innovators, please contact Christy Ward at (949) 764-7238 or Christy.Ward@hoag.org.





Generosity Shines Bright

Celebrating 33 Years of Dedication and Care by Circle 1000

It all started in 1987 when breast cancer survivor and Newport Beach resident Sandy Sewell founded Circle 1000 to support Hoag Family Cancer Institute. Sandy gathered a group of friends to join her mission. She asked them to contribute \$1,000 and to invite their own circle of friends to participate. The generosity spread. In its 33-year history, Circle 1000 has raised more than \$20 million thanks to the support of over 1,000 members.

Each year, Circle 1000 donors gather at a brunch event to celebrate their shared commitment to supporting advanced cancer care at Hoag. Due to COVID-19, the 33rd Annual Circle 1000 Founders' Celebration Brunch could not take place as scheduled this spring.

Despite that setback, Circle 1000 raised over \$865,000 in 2020, which is phenomenal. Through the tireless work of the Founders' Committee and the generosity and understanding of our Circle 1000 donors, the following areas of our Hoag Family Cancer Institute will benefit:

\$344,690 \$200,000 \$150,000 \$50,000

Molecular Imaging and Therapeutics

Molecular Pathology Program

Arden Flamson Oncology Nurse Navigator Program

Bladder Cancer Preservation \$50,000
 Sandy Sewell Oncology Nursing Education Program
 \$30,000
 Non-Nursing Oncology National Education
 \$20,500
 High-Risk Genetic Counseling

\$20,000 Hoag Annual Oncology Nursing Conference

These generous contributions are strongly felt by our community. Each year, over 4,000 new patients receive care at Hoag Family Cancer Institute, which ranks in the top 10 percent of hospitals in the nation for cancer care by *U.S. News & World Report,* an extraordinary achievement made possible by donor support.

As Sue Hagestad, 2020 Circle 1000 Chair, so beautifully expressed, "It is an honor to be part of Circle 1000, and I am proud of what we have achieved together. COVID-19 has shone a light on the heroes among us, especially the health care workers. Pandemic or not, I am extraordinarily grateful to every physician, nurse and team member at Hoag Family Cancer Institute. They are relentless in their mission to provide exceptional cancer care to our community. Thank you for helping make their work possible."

We hope to come together once again in 2021 to celebrate another successful fundraising year.

For more information about Circle 1000, contact Gwen Ritter at (949) 764-7209 or Gwen.Ritter@hoag.org.







A Look Back . . .

This year, we could not come together to embrace the cause for which we all care so deeply. Instead, let's use this time to reflect on the rich history of Circle 1000 by looking back at joyful memories from previous events.











GIFT PLANNING

If Your Goal Is To:	Ask Us About:	And Consider This:
 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.
 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.
 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.
 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.
 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).
 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.).
 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.
 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.
 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.
 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).
 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. For more information , please contact Julie Heggeness at (949) 764-7206 or Julie.Heggeness@hoag.org.

DONOR TRIBUTE

Commitment to Serve

Former Hoag President and CEO Dr. Rick Afable and his wife, Sally, make a gift to support Hoag's efforts to provide care coordination and advocacy for patients

When Rick Afable, MD, learned about Hoag's Care Coordinator and Patient Advocacy Program during a Hoag Promise Campaign Steering Committee meeting, he couldn't wait to tell his wife, Sally, about it. A physician, experienced health care administrator and former President and CEO of Hoag, Dr. Afable understands the complexities and challenges patients often face in navigating the medical system better than most. "The notion of care coordination and advocacy was and is sorely missing in health care," says Dr. Afable. "For a community organization like Hoag to take the step of providing this, knowing that insurance doesn't pay for it and knowing that it's needed but not expected, really resonated with me."

Sally, who has spent much of her life working with the elderly, readily agreed. "I would listen to their frustrations and their family's frustrations in coordinating all of their health care needs. Individuals can be so fragile when they are ill and trying to care for themselves and the ones they love. It's easy for them to get swallowed up by the system."

The Afables were so inspired by Hoag's efforts to do more for patients that they decided to make a generous estate gift in support of Hoag's Care Coordinator and Patient Advocacy Program.

Easing the Patient's Burden

With the opening of Hoag Health Center Irvine – Sand Canyon in 2016, Hoag piloted the Care Coordinator and Patient Advocacy Program. The intention was to dramatically improve the patient experience by providing coordination, navigation and advocacy services. Hoag's care coordinators schedule and coordinate appointments, act as an advocate and personal liaison for patients, assist with insurance authorizations, provide care itineraries, help remove



barriers to care, educate patients about the insurance process and community resources and make navigating the health care system more manageable.

The pilot was so successful, it has grown into four full-time Care Coordinator positions, which have assisted over 7,000 patients to date at Hoag Health Center Irvine, Hoag Health Center Tustin Legacy and Hoag Health Center Foothill Ranch. The Afables look forward to seeing even more patients benefit. Hoag's vision is to implement 10 Care Coordinators throughout Hoag's network of health care centers.

For the Care of Others

The Afable's passion for the program stems from a deep-rooted commitment to serving and caring for others. It has been the driving force behind everything they do. As President and CEO of Hoag from 2005-2013, Dr. Afable helped shape Hoag into the world-class organization it is today: one that serves the community by providing care that is second to none. Today, he leads Be Well OC, a public/private partnership designed to vastly improve the health and well-being of those suffering from mental health and substance abuse issues in Orange County. Sally volunteers her time to teach Bible studies and help women through drug and alcohol recovery.



Thank You to Our Extraordinary Donor Community

A swe head into the final lap of the Hoag Promise Campaign, I want to take this opportunity to express my gratitude directly to you. From day one of this Campaign, you've answered the call to action to support Hoag. You've helped to guide and direct our efforts. You've celebrated each milestone and every victory with us.

United by the call to give back to your community, you've supported the Hoag Promise Campaign and, by doing so, have partnered with Hoag in its mission to be a national leader of care. Because of your generosity, our community has access to worldclass health care today, tomorrow and for future generations.

While we have collectively raised \$700 million thus far in the Hoag Promise Campaign, we still have fundraising goals to meet in some of Hoag's Institutes and Centers. We will continue raising money for Hoag Promise in hopes of meeting or exceeding our fundraising targets by the Campaign end date of December 31, 2020.

Thanks to you, Hoag offers the most elite and highly educated nursing staff both locally and nationally. Our Institutes rank among the highest echelons of national health care and research institutions. Right here in our communities, we have access to Hoag's innovative programs and specialties. This was all made possible thanks to unprecedented community support. Your generosity and commitment is truly extraordinary.

Thank you for sticking with Hoag during the uncertain and unsettling time brought on by the pandemic. Your unequivocal support of our frontline workers is helping Hoag to safely equip our nurses and physicians to serve all who come to Hoag. You're helping to fund essential research that may lead to a vaccine and more effective treatments for COVID-19. Hoag staff could not be more grateful. It lifts their spirits tremendously knowing you are behind them one hundred percent. Your support is deeply felt and treasured by everyone it touches.

On behalf of all of us at Hoag and Hoag Hospital Foundation, and the patients we serve, thank you for leaving an indelible legacy of caring. You have made the Hoag Promise Campaign a success and set a new level of excellence at Hoag that will only keep rising from here.

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Heroes Among Us

We know you're thinking of them, and we are too. Send a message of support, encouragement and gratitude to Hoag caregivers and staff who are working tirelessly to care for our community. Visit **covid19.hoagpromise.org** and write a short personal note. Your messages will mean the world to our Hoag colleagues today and in the challenging days ahead.

