

A Hoag Hospital Foundation Publication

# SCANNER

SPRING/SUMMER EDITION

2022



Sun Family Foundation Donates \$50,000,000 to  
**Hoag's Bold Expansion**

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Richard H. Taketa

## LETTER FROM THE CHAIR

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Dear Friends of Hoag,

It gives me great pride to pen this, my first message to you Hoag supporters, as chair of the Hoag Hospital Foundation Board. When I think about my time leading this distinguished group, I focus on a theme of service. How best can we serve others? I so admire those who came before me and charted a course that guides us as we continue being the best ambassadors of Hoag.

This issue of *Scanner* highlights so many ways that your support serves Hoag and the growing communities it serves, from landmark gifts that are literally changing the landscape of Hoag's campuses to the life-changing employee scholarships that impact the trajectory of their careers. Within these pages, you'll read about the things that make Hoag's supporters, volunteers and friends so vital. Your dedication to Hoag improves the lives of people every day.

Hoag has always been there to meet the needs of the community, which became especially apparent during the COVID-19 pandemic. This public health crisis underscored Hoag's status beyond that of a hospital to a much-needed health care network in Orange County.

I hope my time with the Hoag Hospital Foundation Board is defined by service to my board colleagues, our hospital partners and the families who put their trust in Hoag. Our future is an outcome of the investment we make today.

I challenge us all to continue investing our talents, our hopes and our vision into everything Hoag can become for so many people.

In your service,



Richard H. Taketa  
Chair, Hoag Hospital Foundation Board of Directors





Diana and David Sun with Flynn A. Andrizzi, PhD

## MESSAGE FROM THE PRESIDENT

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### Giving of Ourselves

When I think about our community, I think about the enduring dedication of people giving of themselves to advance Hoag's mission. It takes a special kind of person to envision all that could be. Hoag is profoundly blessed that community members Diana and David Sun are two such people. It is an honor to recognize them for their generous \$50 million contribution toward Hoag's bold future. As you will read in this edition of *Scanner*, this monumental gift is the second largest philanthropic gift ever made in Hoag's 70-year history. It will bolster Hoag's capabilities and reputation as a national health care leader.

The Suns have lived in Irvine for more than 35 years. Their foresight and investment mean that more families will have the opportunity to rely on Hoag. Their gesture of giving, toward their own neighbors and beyond, is a testament to their caring spirit. We have already heard from community members who've been encouraged to give by this gift, emphasizing the goal that Diana and David had when making it: inspiring others.

We continue to charge forward bolstered by this gift and with our return to in-person events. The COVID-19 pandemic compelled us to pause many of them. I am grateful that it has continued to grow

safer for us to host gatherings again. You'll soon read about how Hoag Classic returned this year, reminding me how much I treasure spending time with all of you. It was a heartening way to kick off what we anticipate being a future with more events, camaraderie and good times together.

Through every recent endeavor, I've watched all of you uphold focus on our mission: supporting Hoag. It makes me so proud to conclude this message by sharing that Hoag Hospital Foundation has once again been recognized by the Association for Healthcare Philanthropy (AHP) as an "Overall High Performer" and "Community Hospital High Performer" for fundraising. These designations, which we have maintained for seven years, are a direct result of your incredible commitment. We are in the top 1% among our fundraising peers, an accomplishment that helps Hoag change lives for the better.

Thank you.

Sincerely,

Flynn A. Andrizzi, PhD  
President, Hoag Hospital Foundation

## COVER STORY

# Sun Family Foundation Donates \$50,000,000 to Hoag's Bold Expansion

Diana and David Sun, residents of Irvine for 35 years and counting, are inspiring an entire community. In their minds, they're not the ones making the real difference. "Hoag volunteers and staff—they're the ones with the heart. They're doing the hard work every day," David said.

Before ever stepping foot in the hospital, the Suns knew Hoag by its reputation in the region. Unfortunately, it was the health of Diana's mother that necessitated their first visit—she needed brain surgery after suffering complications from a previous operation at another hospital. The family's experience at Hoag during this difficult time confirmed what they had heard for years—Hoag delivers specialized, compassionate patient care to all.

Diana's mother, now 95, was discharged from Hoag after a successful surgery and month-long stay. "During those agonizing days, I experienced firsthand how Hoag, as a nationally renowned hospital, operates as a well-organized, efficient, friendly and advanced organization," Diana said. It was at this point the Suns knew they wanted to give back to Hoag. Diana and David soon became active members of Hoag's philanthropic community. David's company, Kingston Technology, is a longtime supporter of the Hoag Classic. Diana served on the Hoag Hospital Foundation Board of Directors from 2019-2021 and is currently a member of the Hoag Expansion Executive Committee, a group of community leaders helping shape the future of Hoag through philanthropy.

As their involvement with Hoag evolved, the Suns saw the opportunity to support Hoag's expansion in Irvine with an incredibly generous \$50,000,000

gift—the second largest philanthropic gift in Hoag's 70-year history. Hoag CEO and President Robert Braithwaite said, "The Suns' generosity is allowing Hoag to think big. Their gift will help Hoag lead and increase access to health care both locally and on a national level."

Diana and David moved to Irvine in 1986 and care deeply about the community. It's where they raised their children. "Irvine holds a special place in our hearts. We've lived here longer than any other city in our lives. Now Irvine and its neighboring communities are growing. We wanted to do something for the entire community, for the greater good," said Diana.

But Diana and David don't consider themselves philanthropists. "We're just lucky," David said. The couple immigrated to the United States from Taiwan in 1977. "We didn't have anything," said David. "I just wanted to get a degree in engineering and get a job like everyone else. We aren't different or special. We were just hardworking and very lucky." In Taiwan, David's mother was a high school biology teacher. The family lived in a dorm on campus for staff. Growing up, David watched his mother tutor disadvantaged students eager to pursue higher education. Seeing the transformational impact his mother made on the lives of her students cemented in him the value of helping others.

When Diana and David started the Sun Family Foundation in the 1990s, thanks to the international success of Kingston Technology, they began donating to various education initiatives. "It was a way of honoring my mother and continuing her work," David professed.





“

*Irvine holds a special place in our hearts. We've lived here longer than any other city in our lives. Now Irvine and its neighboring communities are growing. We wanted to do something for the entire community, for the greater good.*

”

– Diana Sun

Diana and David Sun



When asked what they envision for Hoag's future, the Suns defer to Hoag's executive and physician leaders. "We're not the experts," David insisted. "We recognize Hoag's talent. We just gave what we could. Hoag knows what the community needs. We trust them to do what's best."

The Suns have passed down their philosophy on giving to their children, Donald and Dara, who now play more significant roles in the Sun Family Foundation. Dara and her husband Daniel are also supporting Hoag's expansion as a global

destination for medical excellence and unparalleled, people-centered care. Outside of Hoag, Dara is following her grandmother's footsteps by providing scholarships for students in need. Diana and David's niece is helping support senior citizens. For the entire family, it comes back to community and time together, which the pandemic has made even more clear. According to Diana, "The past two years, while we've all been stuck at home, we made Sunday family day. We used to vacation separately; now we vacation together. It's become more important for us to enjoy family time."





With their gift to Hoag, the Suns look forward to expanded services for Orange County's diverse and growing communities. They point to maternity care at the Fudge Family Birthing Suites as just one example of what Hoag is already doing to change the landscape of health care and meet the needs of the population through comprehensive, innovative programs. Hoag's Senior Vice President and Chief Hospital Operations Officer Marcy Brown said, "The Suns are making a remarkable impact on our community and the patients we serve. Their gift is helping Hoag build on its reputation of excellence, recruit and retain world-class physicians at the top of their fields and leverage the latest technology."

By increasing access to cutting-edge research and specialized services, Hoag is redefining what it means to care for the whole patient and changing the future of what health care can accomplish.

"We are all aging and need medical services. I hope I don't ever need them," David joked, "but I would convince anyone who has the extra money to invest in helping Hoag reach other communities." The Suns hope their gift inspires others to see the value of the Hoag experience and the importance of coming together to build a better future for generations to come.



## DONOR TRIBUTE

# A Legacy of Leadership

With the generosity of the Lyon family, Hoag has begun work on building the General William Lyon Leadership Center. This new, state-of-the-art hub will give clinical and hospital leaders room to collaborate on the Newport Beach campus.

The Center will honor the legacy of William Lyon, the late real estate icon and decorated military leader. Thanks to the vision of Lyon's wife, Willa Dean, who made the gift, this area will be one to inspire what General Lyon valued so fiercely: leadership.

On top of a distinguished 35-year military career, General Lyon influenced the landscape of Southern California through his extensive career as a quality homebuilder and through his contributions to the philanthropic and business communities. He passed away in 2020.

"General Lyon left transformative legacies in business and community causes that changed the lives of many. We are so grateful that his

impact will also touch Hoag," said Flynn A. Andrizzi, PhD, president of the Hoag Hospital Foundation. "This generous gift from his family will provide a space for all Hoag leaders to envision, plan and lead together."

The General William Lyon Leadership Center will be housed in the renovated and expanded James Irvine Surgical Center building at the main entrance of the Newport Beach campus. It will be a focal point where Hoag executive, medical and governance leadership can congregate. It will offer them board and conference rooms, executive offices and large open spaces for meetings. There, they will have areas to work together, share ideas and innovate.

The Lyon family sees the Center as a tribute befitting of a man who valued the pioneering spirit and drove to shape the world for the better. Willa Dean said she is proud to carry on her late husband's legacy by establishing the Center.







*“ This Center will align with what my husband valued. He knew the importance of being a leader who looked to the future to improve the lives of others. Hoag physicians are also looking ahead for the next best treatment or procedure to help patients, and my wish is for this space to inspire them as they do that. ”*

*– Willa Dean Lyon*



09-10

HOAG HOSPITAL FOUNDATION | SCANNER SPRING/SUMMER 2022

## EVENTS



### An Ace Hoag Classic!

Hoag celebrated the triumphant return of the cherished tournament and philanthropic event at the Newport Beach Country Club on March 3–6, 2022, with presenting partners Konica Minolta and City National Bank. Fans cheered on golf legends, including Ernie Els, Vijay Singh, Jim Furyk and Bernhard Langer, as they competed on the greens. But it was Retief Goosen who took home the “Doctor of Golf” title and a \$300,000 check for a four-stroke victory. With his Hoag Classic win, he marked his second PGA TOUR Champions title.

Hoag is proud to be the title sponsor of the most philanthropic event on the PGA TOUR Champions. This year’s proceeds will benefit Hoag’s Mary & Dick Allen Diabetes Center, a multifaceted hub of care for diabetes patients of all ages. In the tournament’s 20 year history, it has raised more than \$20,000,000. Over the years, proceeds have benefited many other Hoag institutes, including the Hoag Family Cancer Institute, Women’s Health Institute and Jeffrey M. Carlton Heart & Vascular Institute. The tournament has also benefited military charities through Military Appreciation Day.







# Hoag Classic – Tournament Week Highlights



technology being used at Hoag. As guests entered the tournament, they were met with the opportunity to interact with leading technology, including Surgical Theater, which uses virtual and augmented reality to enhance surgical experiences for patients and physicians. The hall was executed with the help of generous support from sponsors, including Palo Alto Networks, Proofpoint, Optiv, Okta, Tenable, S&L International, Barracuda Networks, and many others. Due in large part to the innovative programs and best-in-class technology provided by philanthropy, Hoag was the highest ranked hospital in Orange County for the fifth year in a row by *U.S. News & World Report*.

## Legends Pro-Am Presented by Konica Minolta

This famous two-day event paired an amateur foursome with a different PGA TOUR Champions professional each day on the championship course before professional play began later in the week. The thrilling experience featured a morning and afternoon shotgun with breakfast, lunch and dinner. It was a memorable experience that concluded with a cocktail reception and awards presentation.



## Breakfast with a Champion Presented by Allergan, an AbbVie Company

Guest of honor golfer Jim Furyk captivated the crowd during a breakfast at the Balboa Bay Resort on March 1, prior to the start of the tournament. Furyk shared with attendees his excitement about playing his first Hoag Classic. Furyk has transitioned to the PGA TOUR Champions after earning 17 wins on the PGA TOUR, including one major championship at the 2003 US Open.



## Hoag Innovation Hall

This year, Hoag proudly debuted the Hoag Innovation Hall, a hands-on exhibit showcasing the latest in

Title Sponsor



Presenting Sponsors







### Military Appreciation Day Presented by CoreLogic

During the 6th annual Military Appreciation Day, all active duty and veterans received free admission, food and beverages. During the day, guests signed the Messages for Military Board and could plant a flag in remembrance of a fallen hero or current service member in the Konica Minolta Field of Flags, benefiting the Blue Angels Foundation. In an impactful ceremony, military honorees were recognized, including two sibling Hoag internal medicine hospitalists who served in the US Navy: Lieutenant Commanders David C. Liao and Janie C. Liao.



### Kingston Technology Scholarship Awards Breakfast

Thanks to the generosity of Kingston Technology and in partnership with Hoag Classic, Hoag employees

are advancing their education and elevating the level of care Hoag provides to our community. During this special breakfast, several scholarship recipients were celebrated and recognized alongside leaders from Hoag and Kingston Technology. Funded completely by philanthropy, the Hoag Employee Education Scholarship Program provides scholarships up to \$5,000 for non-nursing employees who are actively pursuing education to advance their careers at Hoag.



### Student Day Presented by Kingston Technology

Student Day is an annual tradition that takes place during the thrilling final round of the tournament. All students 18 and under received complimentary admission to the grounds. It's a special day that brings people of all ages to Hoag Classic. They had the opportunity to enjoy the Kingston Autograph Arena and capture their favorite players' signatures.

#### Gold Sponsors







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*“With strong support from the community, Hoag feels like a place of alignment and trust between the community, Hoag staff and physicians. It’s our secret sauce.”*

*– Dr. James Caillouette  
Joan & Andy Fimiano Endowed Chair  
in Orthopedic Surgery*

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Gabrielle White and Dr. James Caillouette

## DONOR TRIBUTE

# Hoag Leaders Fund Employee Education Scholarship Program

**Dr. James Caillouette & Gabrielle White on Empowering Hoag Employees to Achieve Career Success**

Hoag orthopedic surgeon Dr. James Caillouette and former Hoag administrator Gabrielle White, two donors responsible for helping found Hoag's Employee Education Scholarship Program, are firm believers in the transformative power of education. "In a holistic sense, it's one of the only ways to create sustainable, positive change in the world. It's fundamental to improvement," said James.

This view of education is largely thanks to James' formative upbringing. With a mother who was a teacher and a father who was an OBGYN in Pasadena and a clinical professor at USC, James grew up in a community steeped in the impact a great education can make in life. Gabby, a nurse by training, was familiar with the opportunities for advanced education available to nurses and saw the potential of developing a similar program to expand access to scholarships for non-nursing staff at Hoag. "I always felt it was necessary. This program offers financial support to the majority

of Hoag employees and is more aligned with the benefits offered to Hoag nurses. When everyone has the opportunity to grow and advance their careers—whether through college degrees or certificate programs—it creates equality for all of Hoag's employees," said Gabby. Together, along with other founders and supporters, they're helping staff at Hoag achieve career success and better support their families. The Employee Education Scholarship Program provides scholarships of up to \$5,000 to offset tuition, material costs and other expenses of earning a degree, diploma, license or certificate related to an employee's career at Hoag.

James and Gabby's conviction in education, particularly at Hoag, is also a result of their long histories with the organization, which cumulatively total 52 years and counting. Hoag is the only hospital for which James has worked. He began his career at Hoag in 1988 and, along with Alan Beyer, MD, helped found the Newport Orthopedic

“ I was honored to receive the Employee Education Scholarship. The support provided by the Foundation was vital in allowing me to pursue higher education in respiratory care and be better equipped to serve our community at Hoag. ”

– Pedro Brazao  
Respiratory Care Practitioner, Hoag



Institute in 1993. In 2006, he began presenting a vision to the Hoag Hospital Board of Directors of what would become the Hoag Orthopedic Institute. Today, he maintains a thriving practice, is chairman of the Hoag Orthopedic Institute Board of Directors and serves on the board of the Hoag Clinic. He received the Joan and Andy Fimiano Endowed Chair in Orthopedic Surgery in 2015.

Gabby joined Hoag in 2001 as part of the management team for Hoag's orthopedic surgery center. As an administrator and clinical leader, she helped the Orthopedic Surgery Center of Southern California build their four-operating-room ambulatory surgery center at 22 Corporate Plaza and spearheaded the perioperative design, construction and staffing of the Hoag Orthopedic Institute. According to Gabby and James, Hoag's culture of excellence and focus on leadership from physician executives down to the frontlines create an atmosphere of care and support that not only keeps patients at its center but also lifts up its employees. "Hoag offers great opportunities for people," said Gabby. These opportunities are



Larry Gonzales, Vice President, Administration, Kingston Technology; Brenda Lumbreras, Scholarship Recipient; Andrew Guarni, Senior Vice President and Chief Financial Officer, Hoag

“ As a single mother raising three daughters while going to school full-time and working part-time, my financial situation is anything but ideal. Kingston Technology's generosity has allowed me to continue my nursing education. I'm so grateful for their generosity and support, which is giving me the opportunity to set a great example for my daughters. ”

– Brenda Lumbreras  
Certified Phlebotomy Technician, Hoag

often driven by community philanthropy. “With strong support from the community, Hoag feels like a place of alignment and trust between the community, Hoag staff and physicians. It’s our secret sauce,” James adds.

The ripple effect of the Employee Education Scholarship Program at Hoag continues to inspire the couple’s involvement. As volunteer leaders, they will be chairing Hoag’s annual Summer Fest, where funds raised will go toward growing the scholarship program for any and all staff interested in advancing their education. “We’re driven to be more actively involved in fundraising because we want to get the word out there. We want this program to be sustainable,” Gabby said.

With success stories of life-changing career advancement, personal testimonials of the program’s impact are plenty. Administrative assistants have gone on to become hospital administrators. Imaging and emergency care technicians have received degrees in public health, business administration and nursing. An intern received her doctorate in pharmacy. This list goes on, and behind each applicant is a moving story of challenges overcome—ultimately for the greater good of Hoag’s patients. “When employees know they are supported, they feel passionate about going above and beyond for patients and families at Hoag, too. We’re all raising ourselves up to something greater,” attests Gabby. In James’ words, “We want to be an institution of lifelong learning. If we’re always learning, we’re always getting better.”

As Hoag expands, empowering employee education continues to elevate Hoag’s innovative programs and services and attract great talent. “Hoag is committed to providing our community with world-class health care, right here in Orange County. There will be no need to travel elsewhere for state-of-the-art care, regardless of the illness. That’s the path we’re on at Hoag,” James confirms. For those interested in contributing, James and Gabby are encouraging Hoag supporters and friends to attend Hoag Summer Fest, where they look forward to visiting with the community after so long apart.

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For more information about Hoag Summer Fest, go to [hoaghospitalfoundation.org/hoagsummerfest](http://hoaghospitalfoundation.org/hoagsummerfest)



## Fast Facts

### Hoag’s Employee Education Scholarship Program

- Launched in 2017
- Open to non-nursing employees
- Provides scholarships of up to \$5,000
- Priority given to employees seeking an undergraduate degree or certificate
- As of February 2022, more than 215 scholarships have been awarded, totaling over \$835,000 in donated funds
- Significant funding for the program comes from Hoag’s own leadership as well as partner Kingston Technology through their support of the Hoag Classic
- Founding donors include:

**Flynn A. Andrizzi**, PhD, President,  
Hoag Hospital Foundation

**Robert Braithwaite**, CEO & President, Hoag

**James Caillouette**, MD,  
Joan & Andy Fimiano Endowed Chair in  
Orthopedic Surgery

**Andrew Guarni**, Senior Vice President  
and Chief Financial Officer, Hoag

**Patrick Mok**, Director of Pharmacy Services,  
Hoag, Retired

**Gabrielle White**



## EVENTS



## Endowed Chair Investiture Ceremony Brings Together Hoag Physicians and Supporters at Long Last

In honor of three new Hoag endowed chairs and their donors, the Hoag Hospital Foundation hosted an investiture ceremony that brought together physicians and philanthropic supporters for the first time since the start of the COVID-19 pandemic. The event, which was held at Lido House in Newport Beach, was originally scheduled to take place in early 2020.

Given the ceremony's long postponement, the Boathouse Ballroom was imbued with joy and gratitude as guests heard the inspiring stories of Robert Gorab, MD, Tom & Mayumi Adams Endowed Chair in Orthopedic Surgery; Robert Louis, MD, FAANS, Empower360 Endowed Chair in Skull Base and Minimally Invasive Neurosurgery; and Subbarao Myla, MD, FACC, FSCAI, MMM, CPE, Dr. Joel H. Manchester Endowed Chair in Interventional Cardiology. Following a white coat processional, honorees—endowed chair holders

and donors alike—told of the impactful roles they've come to play in each other's lives. For Drs. Gorab, Louis and Myla, being awarded an endowed chair marks an important moment in their careers. With the sustainable funding endowed chairs provide, these physicians are changing the future of health care right here in Orange County.

Hoag's endowed chair program, thanks to the generosity of its supporters, continues to bring prestige to the organization and its physicians in their pursuit of medical excellence. Through the program, Hoag is impacting communities far and wide by not only providing world-class care but also training the next generation of experts, including Dr. Louis' nine-year-old daughter, Amandari, who received a white coat of her own, embroidered with the title "Endowed Chair in Training."





# VOLUNTEER IMPACT

## A Legacy of Service

Volunteers are at the core of what makes Hoag special. They always have been. When Reverend Raymond Brahm organized a committee of Presbyterian church members and led a community-wide effort to build a hospital in coastal Orange County, he may not have realized the tradition of community involvement he was beginning. Since that time, volunteers have played a significant role in Hoag’s success, stepping up in crucial moments to propel the organization forward and ensure its ability to provide the highest quality health care to the community.

In 1966, the Board of Directors knew Hoag would need to expand to continue meeting the needs of a growing community. A group of concerned volunteers sprang into action, forming a plan to build financial and volunteer support for Hoag’s

mission. The result was the 552 Club, named for Hoag’s goal at that time of expanding to 552 beds. The 552 board realized early on that they did not simply want donations—they wanted donors who were advocates of bringing exceptional health care to the community.

Today, the Hoag Hospital Foundation partners with volunteers who serve as advocates and more. Out of their passion for Hoag and commitment to the community, they give of their time, energy and heart. “Every Hoag Hospital Foundation volunteer is part of furthering Hoag’s mission,” says Flynn Andrizzi, PhD, president of the Hoag Hospital Foundation. “Although volunteer roles change through time, their value to the organization endures.” Volunteers contribute in a variety of ways.

### Thank You 552 Board!

For 55 years, the 552 board faithfully served Hoag, supporting the organization through many milestones and inspiring community members to do the same. Their support over the years has made an indelible impact on Hoag and our community, one that will not soon be forgotten.

In late 2021, the Hoag Hospital Foundation wound down the 552 board, yet their pioneering spirit and deep commitment to Hoag remains part of everything we do.

With immense gratitude and admiration for the 552 board’s years of service, the Hoag Hospital Foundation looks forward to continuing to partner with these devoted volunteers in new and meaningful ways.



### Outgoing 552 Board

Terry Callahan  
Gina Cereda  
Alexandra Head  
Cindy Kansky  
Arlene C. Key  
Elaine King, MD

Ilona Martin  
Olga Megdal  
Rosalie Puleo  
Chris Rabbitt  
Terri Turner

## Connecting

Volunteers connect fellow community members to the Hoag Hospital Foundation through campaigns, events and other avenues. The recently completed Hoag Promise Campaign mobilized more than 300 volunteers who served on campaign committees. Terry Callahan served as the chair for the Hoag Promise Women's Health Institute Campaign Advisory Committee, helping to raise both friends and funds in support of women's services at Hoag. "You meet these amazing physicians and leaders and learn of their incredible vision to advance Hoag. You get to know their humanity and their commitment to the health of this community. And we have the privilege of sharing that with others so they can join in," Terry recalls of her experience.

Events are another way volunteers serve as conduits. For 35 years, Circle 1000 has garnered support for the Hoag Family Cancer Institute through the annual Circle 1000 Founders' Celebration Brunch. Longtime Hoag Hospital Foundation volunteer Lin Auer is the current chair of Circle 1000. "It's an extraordinary group of ladies," Lin says of the Circle 1000 committee. "We work together as a team to reach out to friends, individuals and corporations, all for the goal of advancing cancer care at Hoag." Their impact has been nothing short of extraordinary. Circle 1000 has raised more than \$23 million for the Hoag Family Cancer Institute and introduced hundreds of new donors to Hoag.

## Advocating

As advocates and ambassadors, Hoag Hospital Foundation volunteers are a powerful voice in the community, carrying the message about the importance of giving. "Hoag continues to reinforce its benefit to the community, so to evangelize and raise awareness of how fortunate we are to have Hoag is an easy thing," says Kyle Wescoat, who currently serves on the Hoag Hospital Foundation Board of Directors. "It's been amazing to watch the generosity of our community."

The result of that generosity is evident. Terry Callahan describes it this way: "As volunteers, the more we can all do to acquaint new people to Hoag

only enhances the quality of care for everyone. It affords the doctors the opportunity to do research, and it affords the very best equipment, technology and life-saving programs."

## Expressing Gratitude

An essential facet of the Hoag Hospital Foundation's work is demonstrating appreciation to Hoag's donors. Volunteers participate in this important work by regularly reaching out to donors to express gratitude for their gifts. Thousands of donors have personally received thank you calls from former 552 board members and other volunteers.

Cindy Kansky, who has been faithfully volunteering with the Hoag Hospital Foundation for more than ten years, has been an integral part of this effort. "Making those connections with our donors is very meaningful to me," she says. "Not only do we have the honor of thanking our donors, but we also arm ourselves with information to inform our community of all that Hoag has to offer and help guide people to the programs that could benefit them."

## Leading

Volunteers provide leadership through the Hoag Hospital Foundation Board of Directors and committees, advising and lending their expertise to help the Hoag Hospital Foundation thrive. After serving as the chair of the Hoag Irvine Campaign Advisory Committee, Kyle Wescoat, former CFO of prominent companies like Vizio and Vans, was asked to join the Hoag Hospital Foundation Board of Directors and currently serves as treasurer. "I'm very pleased to be a part of it, to see it up close and to feel the benefits and satisfaction that come with watching Hoag continue to grow and serve even more beneficiaries," Kyle says. "It's very rewarding."

Collectively, this vital support enables the Hoag Hospital Foundation to reach more donors and deepen relationships, catalyzing the engaged philanthropy that advances Hoag and benefits us all. The volunteer spirit that embodied Hoag from the very beginning is alive and well. Hoag would not be the same without it.



# VOLUNTEER IMPACT

## A Legacy of Service – A Look Back

Volunteer leadership has and will always play a vital role in advancing Hoag’s mission



1960s

Nora and Vin Jorgensen, Volunteers from the Hoag Hospital Foundation’s Founding



1988

Circle 1000 Founders’ Committee Members



2000

Toshiba Senior Classic Volunteer Leaders



2007

Renaissance Hoag Campaign Volunteer Leaders



2012

Former 552 Club Presidents



2019

Physician Campaign Leadership Group Members



2019

Hoag Promise Campaign Committee Chairs

## GIFT PLANNING

# Charitable Gift Annuities – Good for Hoag, Good for You

There are a range of gift planning vehicles that benefit both the donor and the charitable organizations; fortunately, the Hoag Hospital Foundation offers the full spectrum. One such vehicle is the charitable gift annuity, which provides a steady income source to the donor while supporting Hoag.

### How Charitable Gift Annuities Work

In a written agreement, you agree to transfer cash, real estate or appreciated securities to the Hoag Hospital Foundation and, in turn, the Hoag Hospital Foundation provides you, you and a loved one or another person with lifetime payments. The payment amount is determined by the age of the person receiving the payments. When the gift matures, Hoag receives the remaining value of the gift.



The benefits of charitable gift annuities are numerous, both to you and to Hoag.

### Tax Benefits

You will receive a tax deduction in the year you fund the charitable gift annuity. Depending on your gift, a portion of your payments may even be tax-free.



### Guaranteed Income Stream

Payments from charitable gift annuities don't fluctuate when the markets or interest rates change, so you can count on receiving the same amount every year. When funding an annuity, you may also choose to defer payments to a later date of your choosing, but you will still benefit from the charitable tax deduction the year the annuity is funded.



### Your Impact Honors Your Legacy

When you fund a charitable gift annuity, you can support an area within Hoag that you are passionate about. Your annuity assures that these areas at Hoag will have funding secured toward growth and advancement for years to come. (The remaining amount is invested to provide for the lifetime income stream.) Your annuity can support an area within Hoag you are passionate about, and you have the joy of witnessing the impact of your giving.



### Learn more

Connect with the Hoag Hospital Foundation's Executive Director of Gift Planning and Vice President, Legal, Julie Heggeness, JD, CSPG, TEP, to learn more about charitable gift annuities and current annuity rates.

Call (949) 764-7206 or email [Julie.Heggeness@hoag.org](mailto:Julie.Heggeness@hoag.org).



## GIFT PLANNING

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# A Gift for the Future

When it comes to grateful patients, Bob Juneman and his wife Ginger are some of the most. They made a transformative estate gift to Hoag to show their appreciation for the exceptional care they've both received over the years. "I have had five major surgeries at Hoag, all of them with excellent outcomes," Bob said. "That's what Hoag is known for, and I would like that level of care to stay that way."

It was in 2005 when Bob was rushed to the Joan & Andy Fimiano Emergency Pavilion at Hoag Hospital Newport Beach that the Junemans first experienced Hoag care. For someone who'd never stayed in a hospital before, Bob was impressed by the attention and compassion from physicians and nurses and the ease he felt with them during a critical time. "I just can't say enough about the competency and the care of everyone," Bob said. "I've been impressed with so many people at Hoag."

In his friend and former colleague, longtime Hoag supporter Otis Healy, Bob found a guide who would enlighten him further about Hoag's vision for the future. He learned the future involved the growth of services in Irvine, a goal that continues today. They were impressed by Hoag's mission to deliver its trademark care to more communities.

Soon after, Bob joined the Hoag Irvine Campaign Advisory Committee and became involved with shaping its future. In 2014, Bob and Ginger decided to make an estate gift of \$1 million to support Hoag Health Center Irvine. Though at first reluctant to be recognized with their name on a building, the Ginger & Bob Juneman Pavilion has since resulted in some recognition they hope will inspire others.

"Periodically, I'll get a call from friends asking who the best doctor at Hoag is for some condition," Bob said.



"He's an ambassador," Ginger said with a laugh. "We've run into people who have seen our name at the building, and they felt good that they'd seen a familiar name." Bob and Ginger hope their gift will help ensure Hoag maintains the excellence they've come to appreciate and rely on.

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*"This gift was made because we had those good experiences. We want people to have the same care we did," Bob said.*

*"Or even better," Ginger added.*

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Hoag Hospital Foundation

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