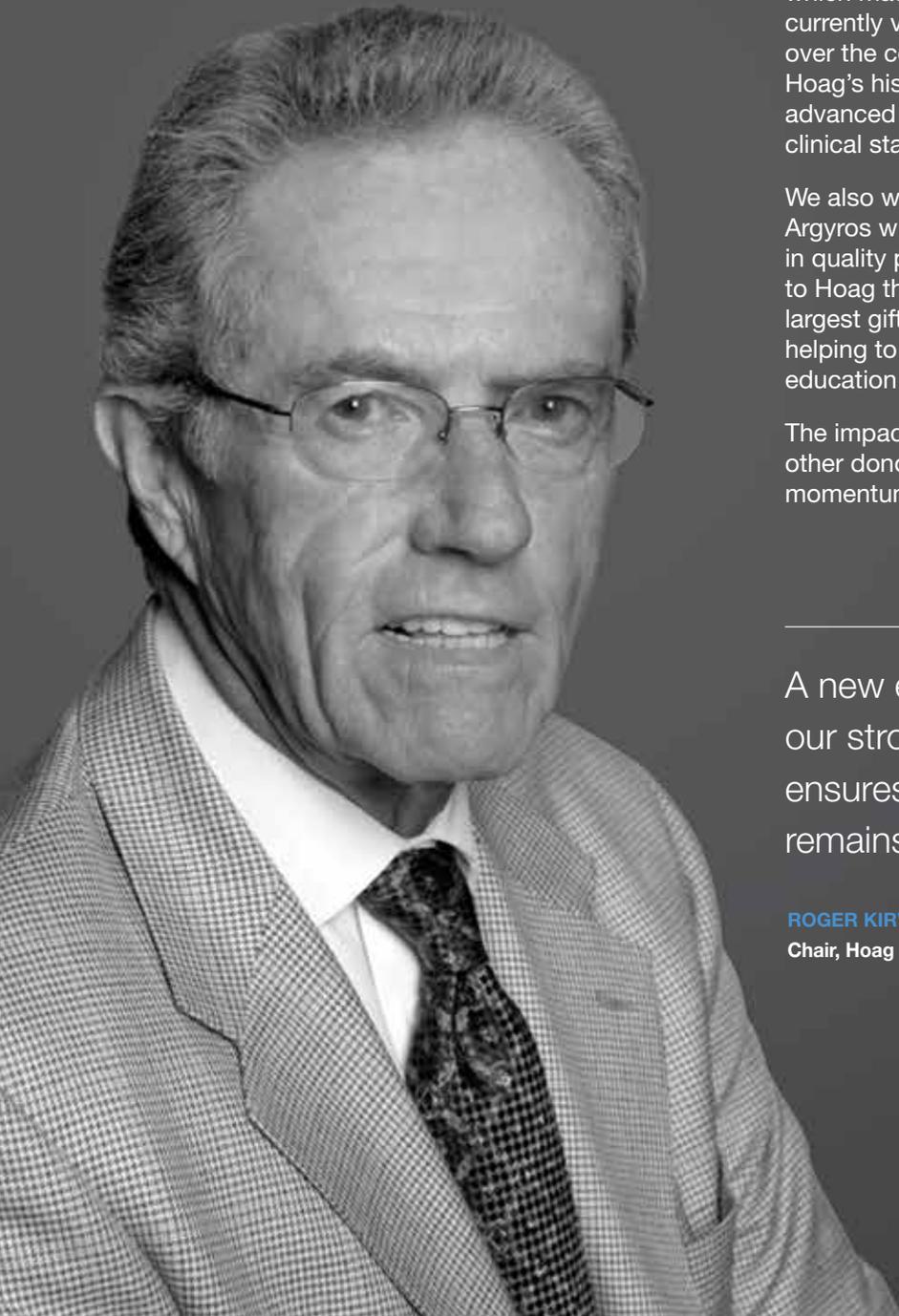


Hoag Hospital Foundation

2013 ANNUAL REPORT





Dear Friends of Hoag:

A new era of healthcare is upon us, and our strong partnership with the community ensures that the Hoag brand of care remains at the level you've come to expect. This is thanks in no small part to 6,908 gifts made to Hoag Hospital Foundation in fiscal year 2013, including two gifts that made Hoag history.

We are deeply grateful to the Jeffrey M. Carlton Estate, which made an irrevocable estate gift to Hoag that is currently valued at \$53 million. It will be distributed to Hoag over the course of many years. The largest donation in Hoag's history to date, Hoag will use this gift to support advanced technology, innovative programs, world-class clinical staff and exceptional facilities.

We also want to thank and acknowledge Julia and George Argyros who, knowing the integral role that nurses play in quality patient care, made a major gift of \$2.5 million to Hoag through the Argyros Family Foundation. As the largest gift to nursing in Hoag's history, the funds are helping to significantly enhance and expand nursing education initiatives at Hoag.

The impact of these gifts, along with gifts from 5,300 other donors last fiscal year, has provided tremendous momentum for our upcoming comprehensive campaign.

A new era of healthcare is upon us, and our strong partnership with the community ensures that the Hoag brand of care remains at the level you've come to expect.

ROGER KIRWAN

Chair, Hoag Hospital Foundation Board

Set to launch in fiscal year 2015, the transformational campaign has an initial goal of \$500 million by 2020.

Many in our country are uneasy about what the changes in healthcare will bring. Thanks to current and anticipated community support, Hoag leaders are developing big ideas that will ensure a smooth transition from today's model to a better and more effective way of delivering the Hoag Experience.

With your continued partnership, Hoag is committed to maintaining its status as the gold standard of care in Orange County and across the nation. We extend our deepest thanks to the passionate community members and volunteer leaders who have come together to support this vision. As we move forward, philanthropy will be Hoag's bridge between good and exceptional in the new world of healthcare.

With Gratitude,

Roger Kirwan

Flynn A. Andrizzi

With your continued partnership, Hoag is committed to maintaining its status as the gold standard of care in Orange County, and across the nation.

FLYNN A. ANDRIZZI, Ph.D.
President, Hoag Hospital Foundation &
Senior Vice President, Hoag



A FEW HIGHLIGHTS FROM FY 2013

MAKING HISTORY

**\$53
MILLION**

(current value)

**Jeffrey M. Carlton
Estate Makes
Largest Gift in
Hoag's 61-Year
History**

**\$2.5
MILLION**

(Gift made through Argyros Family Foundation)

**Julia & George
Argyros Make
Largest Gift to
Nursing in
Hoag History**

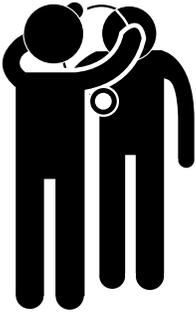
How Do You Make a Nurse's Day?

Choose Nursing, Choose Hoag raised **\$3.5M** and awarded a record number of **243 scholarships** for continuing nursing education

To date, *Choose Nursing, Choose Hoag* has raised **\$22.5M** to support nursing excellence at Hoag



ENDOWING THE FUTURE



1 Investiture Ceremony

Dr. Michael Brant-Zawadzki honored with Ron & Sandi Simon Executive Medical Director Endowed Chair, Hoag Neurosciences Institute



2 New Endowed Chairs

Gross Family Foundation Endowed Chair in Oncoplastic Breast Surgery in honor of Dr. Melvin J. Silverstein awarded to Melvin J. Silverstein, M.D.

Dr. Kris V. Iyer Endowed Chair in Diabetes Care at the Mary & Dick Allen Diabetes Center awarded to Daniel A. Nadeau, M.D.

8 Total Endowed Chairs to Date

STRENGTH IN NUMBERS

\$43.4M* committed to Hoag by 5,299 **friends and community members**

\$8.6M committed by Heritage Society members in **Planned Gifts and Estate Gifts**

498 donors have reached the **\$250,000** cumulative giving level as of fiscal year 2013 to become Hoag Benefactors

JOY IN GIVING

This year, Hoag Hospital Auxiliary members donated:

 **90,000** SERVICE HOURS + **\$105,000** IN GIFTS

TOTAL: \$6.6M IN THE LAST 60 YEARS

EVENTFUL GAINS



Circle of Support

Circle 1000's 26th Annual Founders' Brunch Celebration raised more than **\$800,000**

Circle 1000 has raised more than **\$14M** to date to support outstanding cancer care at Hoag



Golfing and Giving

Toshiba Classic raised over **\$1M** for the Mary & Dick Allen Diabetes Center and has raised over **\$16M** to benefit Hoag in the past 16 years

* Philanthropic results as disclosed herein capture all commitments received during the fiscal year, regardless of revocability, including but not limited to, pledge payments received during the fiscal year on previously recognized pledge commitments and pledge discounts. Not prepared in accordance with Generally Accepted Accounting Principles (GAAP).



Endowed Chair Investiture

Heritage Society Luncheon

Annual Awards Dinner

Choose Nursing, Choose Hoag Luncheon



Because of You

Following are highlights of just a few of the fiscal year 2013 donor-supported initiatives:

Jeffrey M. Carlton Heart & Vascular Institute Naming

The Jeffrey M. Carlton Estate made an irrevocable estate gift to Hoag which is currently valued at \$53 million. In gratitude and recognition, Hoag is committing the first \$15 million to the Heart & Vascular Institute, which is now named the Jeffrey M. Carlton Heart & Vascular Institute.

Record Number of Nursing Scholarships

Thanks to a \$2.5 million transformational gift from Julia and George Argyros, the largest gift to nursing in Hoag's history, Hoag has significantly expanded and enhanced nursing education initiatives which led to 243 scholarships awarded in 2013—a 300 percent increase from the prior year.

Diabetes Care for All

The Mary & Dick Allen Diabetes Center takes an innovative and comprehensive approach that promotes long-term health for those living with diabetes. The critical but non-reimbursable services performed at the Allen Center are funded by philanthropy—in fact, thanks to your generosity, no one is turned away from the Allen Center because of inability to pay for services.

Renowned Medical Director Joins Orthopedic Education and Research Institute

Hoag Orthopedic Institute (HOI) continues to improve patient-centered care through a collaboration with the Orthopedic Education and Research Institute, with a mission to educate physicians, conduct meaningful research and provide leading-edge clinical care. Thanks to your support, Michael Patzakis, M.D., leads the program in which HOI physicians train and mentor clinical and research fellows, making an impact far beyond the walls of Hoag.

Kindness Across the Continuum of Care

Hoag Neurosciences Institute nurse navigators coordinate care across the continuum in areas such as stroke, movement disorders and pain management. Thanks to donor support of this important yet unreimbursed service, navigators help patients understand their diagnosis and treatment options. They also connect them with support groups and other resources, assess psychosocial needs, manage care plans and follow up to measure outcomes, helping to improve patient care protocols.

Endowed Chairs at Hoag to Date:

Gross Family Foundation Endowed Chair in Oncoplastic Breast Surgery in honor of Dr. Melvin J. Silverstein

Current Chairholder: Melvin J. Silverstein, M.D., F.A.C.S.

Grace E. Hoag Executive Medical Director Endowed Chair, Hoag Family Cancer Institute

Current Chairholder: Burton L. Eisenberg, M.D.
Past Chairholder: Robert O. Dillman, M.D., F.A.C.P.

Dr. Kris V. Iyer Endowed Chair in Diabetes Care

Current Chairholder: Daniel A. Nadeau, M.D.

James & Pamela Muzzy Endowed Chair in Cardiovascular Surgery

Current Chairholder: Aidan A. Raney, M.D., F.A.C.S., F.A.C.C.P., F.A.C.C.

James & Pamela Muzzy Endowed Chair in GI Cancer

Current Chairholder: John C. Lipham, M.D., F.A.C.S.

Robert & Georgia Roth Endowed Chair for Excellence in Cardiac Care

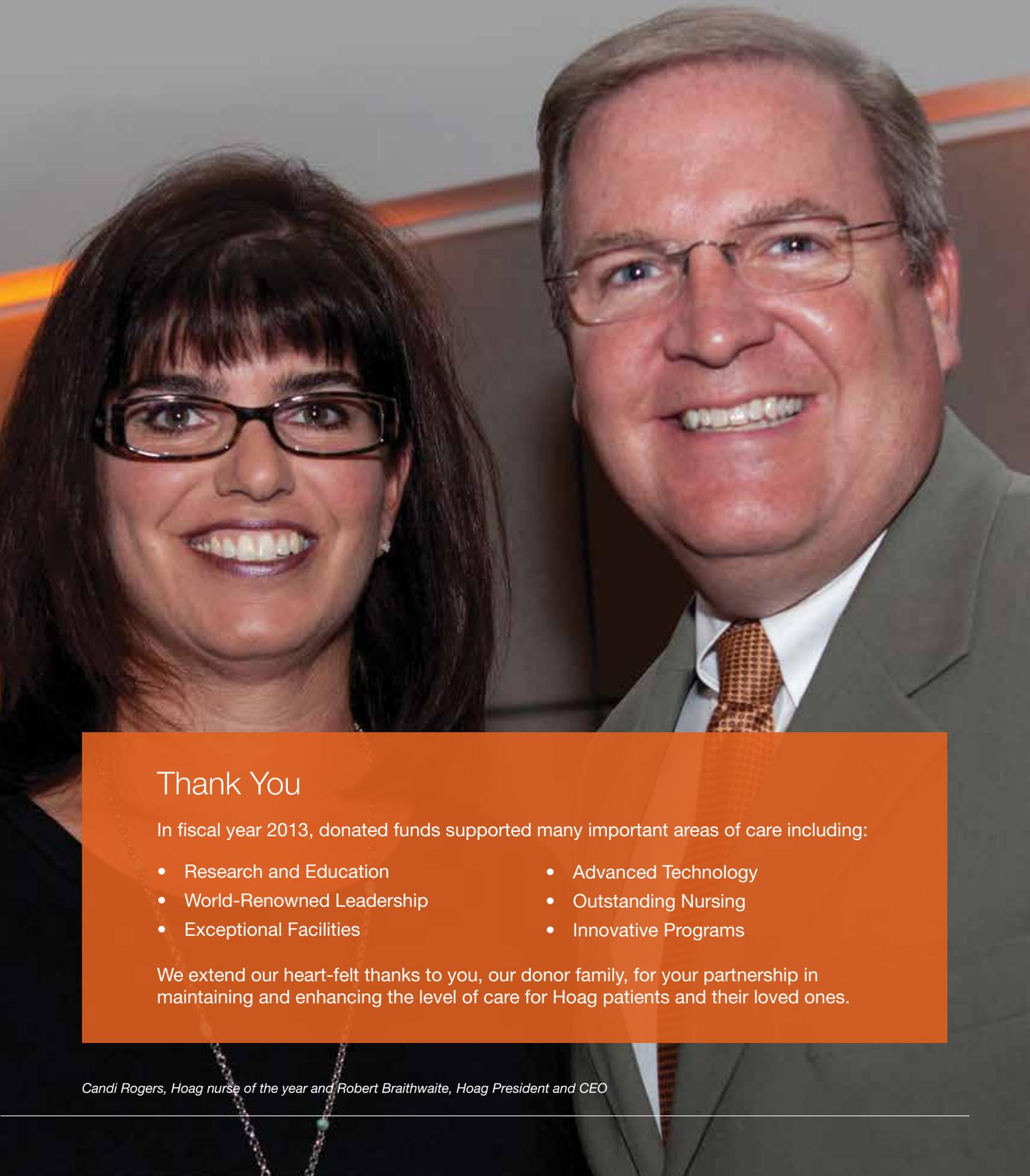
Current Chairholder: Dipti Itchhaporia, M.D., F.A.C.C.

Ron & Sandi Simon Executive Medical Director Endowed Chair, Hoag Neurosciences Institute

Current Chairholder: Michael N. Brant-Zawadzki, M.D., F.A.C.R.

Judy & Richard Voltmer Endowed Chair in Memory and Cognitive Disorders, Hoag Neurosciences Institute

Current Chairholder: William R. Shankle, M.S., M.D., F.A.C.P.



Thank You

In fiscal year 2013, donated funds supported many important areas of care including:

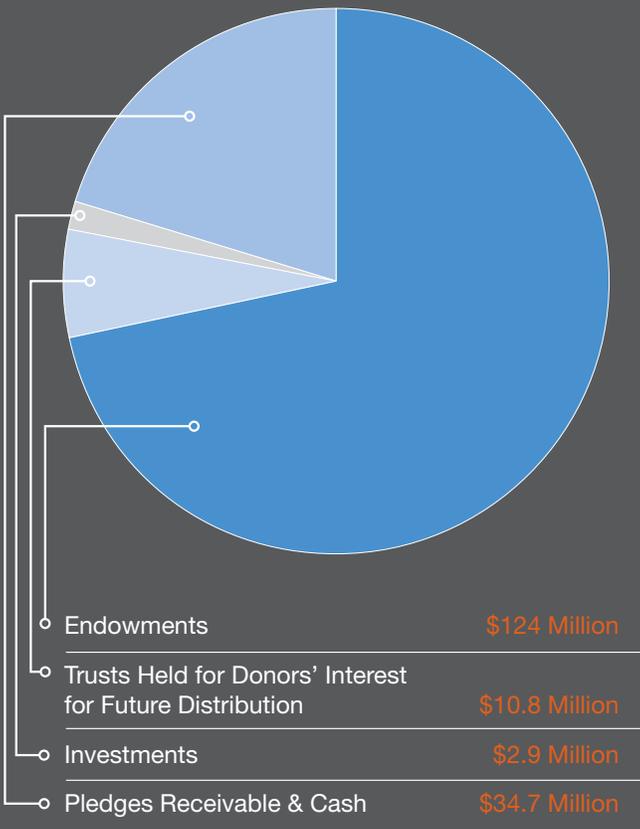
- Research and Education
- World-Renowned Leadership
- Exceptional Facilities
- Advanced Technology
- Outstanding Nursing
- Innovative Programs

We extend our heart-felt thanks to you, our donor family, for your partnership in maintaining and enhancing the level of care for Hoag patients and their loved ones.

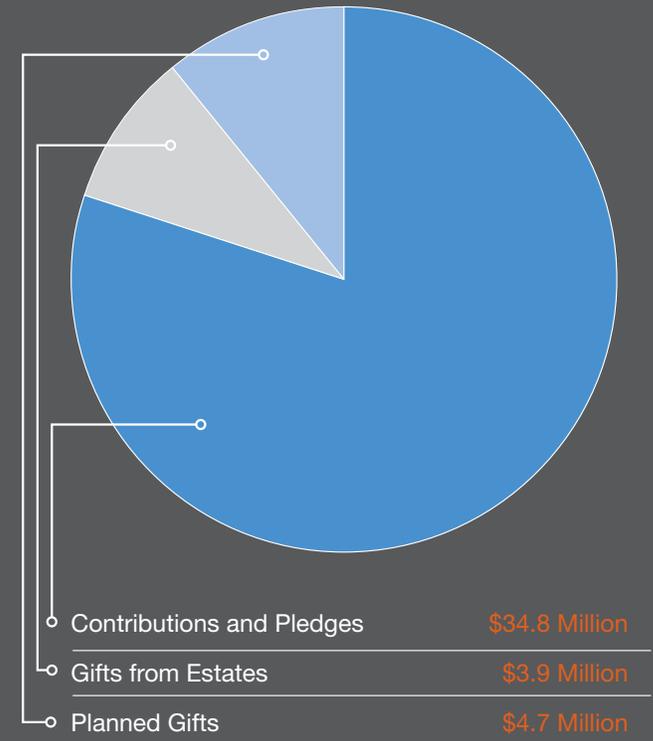
2013 Year-end Review

\$172.4M Hoag Hospital Foundation
Fiscal Year 2013
Total Assets

Financial data is unaudited



\$43.4M* Hoag Hospital Foundation
Fiscal Year 2013
Philanthropic Results



* Philanthropic results as disclosed herein capture all commitments received during the fiscal year, regardless of revocability, including but not limited to, pledge payments received during the fiscal year on previously recognized pledge commitments and pledge discounts. Not prepared in accordance with Generally Accepted Accounting Principles (GAAP).

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