

Community Benefit Report

Hoag Memorial Hospital Presbyterian

2009

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Hoag Memorial Hospital Presbyterian Community Benefit Plan Update 2009

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Executive Summary

The Community Medicine department at Hoag Memorial Hospital Presbyterian was established in 1995. Since its beginning the program has focused on two principal strategies:

- Provide necessary healthcare-related services which are unduplicated in the community.
- Provide financial support to existing community based not-for-profit organizations which already provide effective healthcare and related social services to meet community health needs.

The Department of Community Medicine, led by its Director, Gwyn Parry, MD, is responsible for the coordination of Hoag Hospitals' Community Benefit reporting, and provides free programs to assist the underserved in the community. These include Community Case Management, Community Mental Health Services, Health Ministries Coordination, and Project Wipeout. In addition to these services, many other Hoag Hospital departments provide community health services including education and support groups which are free to the community. The hospital also has substantial relationships with local colleges and universities to invest in the education of various health professions.

Community Medicine grants support Hoag Health Associates- organizations that provide a broad range of services, including the following:

- Free medical and dental care
- Adult day care and education for persons who suffer from Alzheimer's disease or mild dementia, with support and education for their caregivers and families
- Transportation services for local senior centers

Finally, Hoag Hospital provides uncompensated care (charity) to patients who are unable to pay for the full cost of their care. These expenditures amounted to over \$12 million in Fiscal Year 2009 (October 1, 2008 through September 30, 2009.) The hospital charity care and self pay discount policy states that self-pay and uninsured patients who are unable to pay for the full cost of their care may qualify for charity or discounts on a sliding scale for incomes up to 400% of the federal poverty level.

Total quantifiable Community Benefit expenditures for FY2009 at Hoag Hospital amounted to over \$ 83 million.

This report provides detailed descriptions of Hoag Hospital's Community Benefit programs and services, and includes quantifiable data for expenditures by these programs in Fiscal Year 2009.

Introduction

The Hoag Memorial Hospital Presbyterian Community Benefit Program was formalized in 1995 and has grown significantly since that time. We have served over eighty not-for-profit community organizations in a variety of health and social service categories. We continue to emphasize the development of sustained collaborative relationships and the provision of unduplicated services to disadvantaged residents in our community as core elements of the program.

Hoag Memorial Hospital Presbyterian is a full-service, not-for-profit hospital of 498 licensed beds. Located on the Pacific Coast in Newport Beach, California, it is 34 miles southeast of Los Angeles. Fully accredited by the Joint Commission on Accreditation of Healthcare Organizations (JCAHO) and designated as a Magnet Hospital by the American Nurses Credentialing Center (ANCC), Hoag offers a comprehensive mix of health care services. These include the Centers of Excellence in Cancer; Heart and Vascular Institute; Neurosciences Institute; Orthopedic Services; and Women's Health Services.

Quality has always been a top priority, and as a result Hoag was the proud recipient of the 2009 Distinguished Hospital Award for Clinical Excellence, Patient Safety, Orthopedic Care, Stroke Care and Vascular Care. Hoag also received the 2009 Premier Award for Quality. A study by an independent health care research firm placed Hoag within the top 10 percent for a number of specialties based on clinical outcomes: cardiac surgery, coronary intervention, general surgery, joint replacement, orthopedic surgery, stroke care, vascular care. The public has also voiced their opinion of Hoag and for the 14th consecutive year, Hoag has both been named Orange County's most preferred hospital by readers in a local newspaper survey and most preferred hospital by residents in the National Research Corporation's (NRC) Consumer Choice Award, based upon overall quality of health care services.

The hospital serves its surrounding communities with health centers located in Costa Mesa, Huntington Beach, Fountain Valley, Aliso Viejo, two Irvine locations and its newest location in Newport Beach just a few blocks from Hoag Hospital Newport Beach. Hoag is also on track to open Hoag Hospital Irvine (HHI) in Fall 2010. The new hospital will be an acute care general hospital with a fully-staffed emergency room focused on improving the flow of emergent care and feature Hoag Orthopedics, an inpatient hospital within HHI, progressive cardiac care and dedicated hospitalists committed to expanding care 24/7. Hoag currently employs over 4,000 dedicated, highly skilled people and is fortunate to have a strong volunteer program composed of 1,400 participants who provide over 100,000 hours of annual support.

History

Hoag Hospital was opened in 1952 as a community partnership between the Presbyterian Churches of the Los Ranchos Presbytery and the George Hoag Family Foundation, a private charitable foundation.

As a not-for-profit institution, ownership and board election remain vested equally in the corporate members: the 58 Presbyterian churches of the Los Ranchos Presbytery and the charitable George Hoag Family Foundation. Governance is provided by a Board of Directors comprised of sixteen voting members who serve overlapping three-year terms. Board membership consists of twelve individuals elected at large, and an additional three voting members who are elected from the active medical staff. The hospitals' Chief Executive Officer is also seated on the board as a voting member. An annual meeting at the end of the fiscal year provides the corporate members the opportunity for the election/reelection of directors for the ensuing year.

Since its founding the hospital has welded a strong commitment to the community that it serves, including the provision of services for those who constitute a more vulnerable, at-risk population. Such care, for both inpatients and outpatients, is often only partially compensated. With excellence of management and the diligent stewardship of funds, Hoag has been able to sustain its financial strength. As a result, Hoag has been able to maintain a continuing commitment to quality of care while developing and expanding community programs and partnerships. Most of the funds expended upon Community Benefit are from operating income. Nursing professorship grants and our Cell Biology work in primary clinical research are funded by transfers from the hospital foundation.

Hoag Hospital Irvine

Hoag Hospital achieved another milestone in its 55-year history and will be opening Hoag Hospital Irvine in Fall 2010. Currently under construction to ensure the highest level of care, Hoag Hospital Irvine will open as an acute care general hospital offering residents of Irvine and the surrounding communities a spectrum of inpatient and outpatient services, as well as a fully staffed emergency room dedicated to improving the flow of patient care.

Hoag Hospital Irvine will also feature Hoag Orthopedics, an inpatient hospital within HHI, progressive cardiac care and dedicated hospitalists committed to expanding care 24/7. Patients can expect experienced and dedicated physician leadership at HHI in each of the dedicated service areas and the same quality care they've come to know from Hoag's Newport Beach campus.

Hoag Hospital Irvine is located at 16200 Sand Canyon Ave., Irvine, CA, right off the 405 freeway at Sand Canyon.

For more information, visit the Web site www.HoagHospitalIrvine.org.

Mission, Core Values, and Vision

Hoag's Mission Statement is developed and regularly reviewed by hospital leadership, approved by the hospital Board of Directors, and communicated to Medical Staff and employees throughout the hospital. The hospital Mission Statement and Core Values are as follows:

“Our mission as a not-for-profit, faith-based hospital is to provide the highest quality health care services to the communities we serve.”

Core Values

Excellence

Respect

Integrity

Patient Centeredness

Community Benefit

The hospital Vision Statement declares:

“Hoag is a trusted and nationally recognized healthcare leader.”

The hospital has designated six Core Strategies to achieve our mission and vision:

Quality and Service

Hoag Hospital will be recognized as a leading hospital in California for its excellent performance in safety, service and clinical quality.

People

Hoag Hospital will attract, develop, and retain a high-performing workforce and develop a workplace environment that reflects its values and commitment to its employees.

Physicians Partnerships

Hoag Hospital will create sustainable, mutually beneficial partnerships with exceptional physicians.

Strategic Growth

Hoag Hospital will be the specialty hospital of choice throughout Orange County.

Financial Stewardship

Hoag Hospital will maintain its financial strength within the AA bond rating category.

Community Benefit and Philanthropy

Hoag Hospital will provide resources and partner with community-based organizations to improve the health of our communities.

Community Benefit Philosophy

We are encouraged by the better angles of our nature and the disposition of our hearts to think favorably of our fellows, regardless of their circumstances, and to do them good: improving and sustaining their health and the quality of their lives and thus benefiting all.

The Department of Community Medicine provides direct services and collaborates with other not-for-profit community-based organizations to promote the health of our communities. The Department coordinates Hoag Hospital Community Benefit activities, driven by the health needs of our surrounding communities, which are regularly reviewed in an ongoing manner.

Hoag's Community Benefit Program is guided by five Core Principles:

- *Emphasis on Disproportionate Unmet Health-Related Needs (DUHN)* - We concentrate on residents who have a high prevalence of severity for a particular health concern; and on residents with multiple health problems and limited access to timely high quality health care.
- *Emphasis on Primary Prevention* – We focus on program activities that address the underlying causes of persistent health problems as part of a comprehensive strategy to improve health status and quality of life in local communities.
- *Build a Seamless Continuum of Care* – We work to develop and sustain operational linkages between clinical services and community health improvement activities to manage chronic illnesses among uninsured and publicly insured populations.
- *Build Community Capacity* – We target our charitable resources to mobilize and strengthen existing effective community health services.
- *Emphasis on Collaborative Governance* – We emphasize *Networking* to exchange information; *Coordination* of synergistic activities; *Cooperation* in sharing resources; and *Collaboration* to enhance the combined capacity of our community health partners.

The department provides services which are unduplicated in the community. These currently include case management, community counseling and the coordination of faith-based nursing. Each of these programs is focused on DUHN community residents. We help these individuals obtain the health care and related services that they need, including medical insurance, and assist them by coordinating the necessary medical, dental and social services.

In order to promote effective access to health care and related services, the department works in collaboration with a number of not-for-profit community based organizations to provide insurance coverage as well as free services to underserved and vulnerable residents, many of whom are undocumented. Department services provide immediate solutions to the needs of some residents, and we give grants to expand insurance coverage and enhance the medical services available to these individuals.

Charity care is an integral component of the benefit that Hoag provides to the community. The current hospital Charity Care and Self Pay Discount Policy provide assistance on a sliding scale for uninsured and self-pay patients with family incomes up to 400% of the Federal Poverty Level. The Federal Poverty Level is defined as a minimum amount of income that a family needs for food, clothing, transportation, shelter and other necessities. For a family of four, the current annual Federal Poverty Level in FY2009 was \$22,050. The current Charity Care and Self-Pay Discount Policy is provided in Appendix A. In FY2009 the hospital served 13,469 Charity Care cases.

A summary of the quantifiable Community Benefit provided by Hoag Hospital in FY2009 (October 1, 2008 through September 30, 2009) is provided in Appendix B, which begins a section that provides narrative descriptions of Hoag Hospital Community Benefit programs. Appendix C provides a detailed listing of the Community Benefit programs with the total expenditures.

Covenant with Los Ranchos Presbytery

In 2007, Hoag Hospital entered into a covenant with Los Ranchos Presbytery a hospital corporate co-owner (with the George Hoag Family Foundation). This covenant is intended to strengthen the partnership between the Presbytery and the hospital, and to broaden its scope; to further the effort to meet the health care needs of member congregations and local communities. The covenant is a "...organizational framework which will assist in accomplishing Hoag's mission as a not-for-profit, faith-based hospital that provides the highest-quality healthcare services to the communities we serve." The goals of the partnership are to:

1. Improve healthcare in the community.
2. Provide the benefits of faith-based healthcare and values in the community.
3. Communicate the benefits of the partnership to the Presbyterian churches and members of the Hoag organization, and to the communities we serve.
4. Enhance the mission and ministries of the Presbyterian congregations and Hoag Hospital.

Primary Initiatives for FY2010

- Continue to provide and expand Community Medicine services, with an emphasis upon health promotion and disease prevention activities.
- Sustain Community Health Collaborations.
- Promote the expansion of Community Benefit services for those less fortunate.

Community Needs Assessment

California Community Benefit legislation, with specified exceptions, requires that not-for-profit hospitals conduct a community health needs assessment every three years. The community health needs assessment involves the identification of both unmet health-related needs and existing community assets. Hoag Hospital meets this requirement with the Orange County Health Needs Assessment (OCHNA), a collaborative partnership of hospitals and other public and private health-related organizations in the county. Hoag's participation with the OCHNA insures the continued viability of this vital source of community health data, which all Orange County hospitals, as well as other organizations, may use to determine priority health concerns. The Web address for the Orange County Health Needs Assessment is www.ochna.org.

The Community

With the expansion of the depth and breadth of hospital services, and the specialized services provided in our Centers of Excellence, the hospital service area has grown to encompass the entirety of Orange County, and even beyond the borders of the county into Los Angeles, San Diego and other neighboring counties. For purposes of Community Benefit planning and reporting, the service area is defined as Orange County with particular emphasis upon the following neighboring cities:

Newport Beach
Costa Mesa
Huntington Beach
Irvine
Fountain Valley
Garden Grove
Laguna Beach
Westminster
Santa Ana

The area covered by these cities is diverse demographically, ethnically and economically. Some key characteristics include:

Senior Population: The following is the percentage of seniors (65+) living in some of Hoag's service areas (2008 American Community Survey).

Newport Beach 16.4%
Huntington Beach 13.4%
Costa Mesa 8.4%
Irvine 8.2%
Garden Grove 10.0%
Westminster 15.0%
Santa Ana 6.4%

Benchmarks:
Orange County 11.4%
California 11.2%

Household Income: Orange County does have a higher median household income (in 2008 inflation-adjusted dollars) than the state. The median household income for Orange

County is \$75,078 and \$61,021 for California, but according to the 2007 OCHNA data, approximately 9% of households in Hoag's service area have incomes of less than \$25,000. The 2008 American Community Survey (ACS) estimates that 10% of individuals in Orange County have income below the poverty level in the last 12 months. An estimated 8% of seniors in Orange County have income below the poverty level in the last 12 months (ACS).

Ethnic Diversity: The population in Orange County remains predominantly Non-Hispanic White. The OCHNA 2007 data estimates the county population to be 51.7% White, 1.7% Black, 29.8% Hispanic/Latino, 5.7% Vietnamese, 8.9% other Asian/Pacific Islander, and 2.2% Other. Two primary ethnic groups are White and Hispanic, with Asians making up a sizable percentage of the total county population.

In Hoag's service area, ethnic group distribution is similar to the county's, but the hospital serves more Whites and Asians than Hispanics, based on OCHNA 2007 population estimates. The service area is 57.1% White, 21.4% Hispanic/Latino, 7.9% Vietnamese and 11% other Asian/Pacific Islander. Pockets of diversity in the cities that Hoag Hospital services are in Santa Ana (62.6% Hispanic), Costa Mesa (33.4% Hispanic, 61% White), Garden Grove (21.8% Vietnamese), Irvine (31.4% other Asian/Pacific Islander, 2.8% Vietnamese), and Westminster (36.3% Vietnamese, 23.8% Hispanic, and 32.1% White).

Homelessness: Although it is true that Orange County is an affluent county with a median annual household income of \$75,078 (2008 ACS), it is estimated that there are at least 35,000 homeless people in Orange County.

Each year, the County of Orange conducts a homeless needs assessment. Homeless shelters and service providers throughout the county are surveyed to determine the existing inventory of beds and services for the homeless as well as the total number of homeless by sub-population (www.shelterforthehomeless.org).

Some key findings from the County's 2005 homeless needs assessment survey:

- The number of people that become homeless in a given year is estimated at almost 35,000 individuals in Orange County.
- Families with children represent about 60-70% of the homeless population (approximately 24,000 parents and their children).
- An estimated 10,200 homeless children live in Orange County.
- There are approximately 41 temporary shelters providing 2,647 beds for the homeless on any given night. The need for additional shelters and more permanent housing is apparent.

Health Insurance: While significant efforts have been made to expand health insurance coverage for children in the State of California, an estimated 27,677 children were uninsured according to the 2007 OCHNA survey. The OCHNA 2007 survey population

estimates there were 57,271 adults (7.1% of adult population in Hoag's service area) and 11,292 children (4.3% of children in Hoag's service area) with no insurance.

Service Objectives

The service objectives of the Community Benefit program remain as initially defined:

- Access: To ensure adequate access to medical treatment through the availability of inpatient, outpatient and emergency medical services.
- Services for Vulnerable Populations: To provide health care services to uninsured, underinsured and indigent populations.
- Education/Prevention: To address the community health needs identified by the community health needs assessment through screening, prevention and education programs and services.
- Research: To provide new treatments and technologies to the local community through participation in primary clinical research.
- Collaboration: To establish and participate in collaborations which address community health priorities.
- Coordination: To provide case management services which coordinate medical and social services for vulnerable community residents

Department of Community Medicine Programs

The department of Community Medicine provides direct Community Benefit service programs and coordinates Community Benefit reporting at Hoag Hospital. This section of the report provides information for each of the Community Medicine programs and achievements in FY2009.

Community Case Management

This program exists to provide assistance to needy residents as they negotiate the local health care delivery system. Many local residents do not use available resources due to language barriers, lack of insurance, and lack of awareness about existing health care resources. Department Case Managers break down these barriers and work with individuals to identify, understand and gain access to medical services.

Bilingual Case Managers work with Share Our Selves Free Medical and Dental Clinic (SOS) to assess each patient's eligibility for funding resources, including MediCal, Healthy Families, Medical Services Initiative Program (MSI) and California Kids. Over 800 SOS patients were screened for MSI coverage in FY2009. If the patient is eligible for insurance, the Case Manager coordinates the application process and provides referrals to services across a variety of health care providers, to provide the patient a seamless continuum of care from onset of illness to recovery. In addition to assistance with insurance eligibility screening and application, Community Case Management staff provided assistance for 2673 SOS patients who were referred for hospital services in FY2009. There were 51 patients referred to the hospital for surgical procedures.

Community Case Management staff work in several other programs to improve access to health care services for low-income residents in our community:

- In collaboration with Orange County Health Care Agency, we coordinated specialty care services for 6 HIV/AIDS patients during FY2009.
- We collaborated with community physicians, to provide free access to the Sweet Success gestational diabetes education program for 30 low-income women during the reporting period.
- We recently established a collaborative agreement with AccessOC which provides free low risk surgeries for those within our community. During FY 2009, 11 patients received surgeries thus providing them a better quality of life.
- We have a long-term commitment with local senior centers to provide a personal alert (Lifeline) system to frail homebound elderly residents. Senior Centers make referrals to our Case Managers, who establish the service. Hoag Hospital paid for the installation and monthly services for 14 individuals in this program in FY2009.

Case management is an educational process, to provide an increased awareness of the services available and to offer preventative health tips. It empowers patients to lead a healthier lifestyle and results in improved health status and less reliance upon costly emergency care. Case management is also beneficial to hospital staff providers, who call upon Case Managers to assist with community resources and referrals for patients with difficult circumstances.

Contact Rebecca Barnard, MSN, RN, Community Services Program Manager at (949)764-6953 or email rebecca.barnard@hoaghospital.org

Community Counseling Services

This program was founded to provide free bilingual bicultural services to people who otherwise could not obtain mental health services. The majority of the program's clients are low-income and uninsured. We have seen a large increase in the number of clients who are underinsured. These clients have limited health insurance with no mental health/behavioral health benefits or they can no longer afford the co-payments and/or deductibles.

The program employs six full-time bilingual Master's prepared social workers. During FY 2009 the program provided mental health services to 426 clients in the form of psychotherapy, resource brokering, and/or case management. In addition the program offered psychotherapeutic and psychoeducational groups to 955 participants. All services are offered on a short-term voluntary basis and at no charge. The program has an additional training program for professional social workers interested in working with the low-income and uninsured population. In FY 2009 we provided clinical supervision toward licensure for social workers at local not-for-profit organizations. We also provided a supervised clinical internship program for five MSW (Master's Degree in Social Work) students from the University of Southern California and from California State University at Long Beach during FY2009.

The program provides consultation, support and education to paraprofessionals at associated agencies such as Share Our Selves Free Medical and Dental Clinic, Girls Incorporated and the Newport Mesa Unified School District. Support included telephone consultation, workshops and in-service education during FY2009.

The program participates in a number of collaborative efforts with other not-for-profit agencies in the community. These efforts allow the agencies to offer mental health services at no cost to their clientele and all services are provided in-kind to the not-for-profit agencies. These collaborative efforts led to several different psychotherapeutic and psychoeducational groups being offered in the community. Several groups were offered for women. Some examples include: a cancer support group, depression support groups, self esteem groups and stress management workshops. Groups were also offered for parents, families and adult couples struggling with relationship issues. A review of client demographics found that the majority of the clients seen through the program are female, Hispanic, and speak Spanish as their primary language. The average age of the clients was 32 and the clients most frequently reported having an annual household income of between 10 and 19 thousand dollars.

Contact: Michael Rose, LCSW, Mental Health Program Manager at (949)764-6278 or email michael.rose@hoaghospital.org

Health Ministries

The mission of the Health Ministries program is to educate, train and support leaders and members of congregational communities in the implementation and on-going assistance of Health Ministries and Faith Community Nursing. Our first goal is to recruit and train a well qualified Registered Nurse (RN) for the congregation and give her/him the necessary tools, continuing education and a network of 59 other RN's available for collaboration and consultation. Our second goal is to provide or refer unduplicated programs and services to meet the congregations' greatest body, mind and spirit needs emphasizing health promotion and disease prevention. We have monthly Health Ministries Meetings with speakers providing resources and education for our Faith Community Nurses (FCN). This also allows them the opportunity to meet and network with other FCN's in our community. The department of Community Medicine employs two Registered Nurses who manage and coordinate the program.

The program has 34 congregations from eleven different denominations and belief systems. Collaborative efforts with our Community Counseling Services have led to Social Workers providing free counseling and support groups to low-income and the uninsured at one of our inner city churches. The Social Workers collaborate with the FCN's with program development and referrals.

The program participates in a number of collaborative efforts with other not-for-profit agencies such as the Alzheimer's Family Services Center in Huntington Beach. These efforts have led to in-depth education of dementia prevention along with earlier identification and treatment by bringing educational programs into the congregations as well as teaming up with the FCN's during home visits. This relationship also produced the Spirituality and Alzheimer's Conference for Pastors and Faith Community Nurses with over 100 attendees.

There are approximately 35,000 congregants belonging to our 34 associated congregations. The program enables the FCN's to work within their congregational community providing programs, resources and education specific to the needs of their population. The Health Ministries and Faith Community Nursing program was responsible for 21 congregations and their congregants from all ages in learning how to correctly wash their hands through the Glitter Bug Training Program. Thirty one of our congregations and Faith Community Nurses were provided with seasonal influenza vaccine, resulting in 7800 at risk children and adults receiving influenza vaccine at no-cost. Within our congregations, 300 congregants were taught CPR with or without AED training and First-Aid.

Contact: Cassie Parker BS, RN Coordinator of Health Ministries at 949-764-6565 or email cassie.parker@hoaghospital.org

Project Wipeout

The mission of Project Wipeout is to educate and raise awareness on injury prevention at the beach, particularly neck and spinal cord injuries, by distributing beach safety information locally and nationwide.

Project Wipeout:

- Emphasizes education on drowning and neck and spinal cord injury prevention
- Focuses its efforts on those most at risk, children and young people between the ages of 16 and 30
- Participates in community events and provides free beach safety educational presentations and materials to schools and community organizations
- Collaborates with members of Lifeguard and Fire Departments, teachers, parents and committed volunteers to broaden public access to our beach safety message.

Project Wipeout's intent is to provide basic information on the types of injuries that occur, how they happen, and what to do to protect against them. This information is disseminated via presentations, videos, and printed materials at schools, community events, lifeguard training, and seminars. More than 30,000 copies of Project Wipeout brochures, coloring books and activity books are distributed annually through community events and at elementary, junior high and high schools.

Print materials are also used at presentations given by local lifeguards, which feature Project Wipeout's video (mandatory viewing for trainees in Orange County's junior guard programs). It is also being used throughout the U.S. and by lifeguard departments as far away as England and Australia, and it is seen by thousands of elementary, junior high and high school children every year.

Contact Kris Okamoto, RN, CNRN, Project Wipeout Coordinator at (949) 633-6825 or email kenoka@pacbell.net

Other Hoag Community Benefit Activities

Hoag Hospital's commitment to Community Benefit is best exemplified by the dedication of an entire department to the coordination and provision of Community Benefit programs. The hospital's Community Benefit activities are not limited to the department of Community Medicine, however. Other hospital departments provided a wide range of Community Benefit activities in FY2009, including health professions education, clinical research, support groups and many more. This section of the report features a discussion of some examples of the Community Benefit activities that were provided by other hospital departments in the current reporting period.

Health Professions Education

In an effort to increase the community pool of available trained and educated health professionals, Hoag Hospital invests annually in health professional training and development. The hospital currently works with a number of professional groups in this endeavor, including Nurses, Physical Therapists, Pharmacists, Laboratory professionals and Social Workers. Please see Appendix C: Health Professions Education for a breakdown on expenditures for FY 2009.

Marion Knott Nursing Education Center

Hoag opened the Marion Knott Nursing Education Center in February of 2007. This center was designed to provide both Hoag nurses and those from the surrounding area access to state-of-the-art facilities to enhance their knowledge of health care best practices. The center features dedicated classroom space and the latest hospital and teaching technology, intended to educate Hoag's current nursing staff, new hires and nursing students from area colleges. Supported by a substantial donation from Marion Knott, and augmented by contributions from other community members, the center will achieve a number of nursing education goals:

- Provided post conference space for 26 rotations of nursing students each semester for a total of over 500 RN students per year.
- Orientation of newly hired nurses to ensure best practices – including approximately 75 newly graduated RNs each year in special new grad programs. Classrooms provide space for BSN and MSN classes to advance education opportunities for Hoag nurses.

Clinical Research

Hoag Hospital participates in primary clinical research in several clinical services: the Hoag Cancer Center, the Neuroscience Institute, the Heart and Vascular Institute, and Women's Health Services. Most of these studies are to evaluate the effectiveness of pharmaceuticals, biological agents and medical devices. In addition to these physician led investigations, several nursing studies are also ongoing. Most of these studies receive financial support from external funders, including the Hoag Hospital Foundation.

Laura Morrelli, the Cancer Center Director of Operations states "Cancers are in some ways similar, but each is unique for each individual. The future of cancer therapy may be individualized for each patient and his/her tumor and biologic system." The Hoag Cell

Biology lab focuses on utilizing a patient's own immune cells, blood cells and tumor cells in treatment. The unique biotherapy trials associated with the Cell Biology lab include autologous tumor cell vaccines, and autologous activated lymphocytes, to treat cancers of the brain and kidney as well as melanoma. As the Medical Director of the Hoag Cancer Center, Dr. Robert Dillman is the Principal Investigator for these studies. In FY2009, 16 patients benefited from participation in this program which was funded by the Hoag Hospital Foundation. Total Foundation expenditures for FY2009 for this program was \$601,470.

Anticoagulant Clinic

The Anticoagulation Clinic was established by Hoag Hospital in 1999 as a free community service for 30 patients, and has grown to serve over 1400 patients in FY2009. The main goal of the program is to manage oral anticoagulation therapy by monitoring and evaluating patient clotting factor data. The clinic also coordinates care, and educates patients who visit the clinic an average of 2.5 times per month. The program provides telephone consultation and support to patients, family members, and referring physicians. Patients visit an outside lab for blood testing. Test results are reviewed by a staff RN who contacts the physician and patient within 24 hours for dosing regime changes or other actions. The cost to Hoag of running this program was approximately \$900,000 in FY2009.

The principal strategy of the Department of Community Medicine is to not “reinvent the wheel” with respect to providing necessary community health programs and services. We work closely with a broad array of community based not-for-profit organizations, and provide grant funding to some organizations whose services are consistent with our priorities. Further, we sometimes act as a fiscal intermediary for third party foundation funds. This collaboration enables us to participate in the follow-up process, by providing guidance and monitoring for grantees. This section of the report provides descriptions of some of our most important community health associates and their achievements in FY2009.

Share Our Selves Free Medical and Dental Clinic (SOS)

Hoag Hospital’s Department of Community Medicine and Share Our Selves Free Medical and Dental Clinic form a strong relationship committed to providing quality health care to uninsured Orange County residents. The SOS Free Clinic is one of Hoag’s primary associates; managing the flow of low income patients and providing a comprehensive healthcare facility to provide follow up care. The Hoag discharge planners and case managers consult with the SOS Medical Director frequently for assistance in discharging patients to SOS or for outpatient healthcare or social service needs. The Medical Director is a recognized expert in the healthcare needs of medically indigent patients. More than 15% of SOS patients are ER diversions, meaning if SOS was not here they would have accessed care in the local ER. Many of these patients have a severe chronic disease that needs the complex case management offered by SOS, keeping them in optimum health and out of the ER, supporting their families and contributing to the economy.

Less than a mile away from Hoag, Share Our Selves provided free medical and dental care for 7,011 low-income, uninsured individuals in FY2009. Forty percent of those patients are shared with Hoag Hospital, a seamless system of care benefiting the entire community. Hoag is unique in its collaborative spirit and a model in efficient, effective, and respectful healthcare. Karen McGlenn, Executive Director of Share Our Selves, praises this extensive hospital-clinic connection, saying that “this relationship creates a community where healthcare for all becomes the focus of service and sets the standard for others to follow suit.”

Hoag and SOS also collaborate with the county’s Medical Services Initiative (MSI) Program. Hoag is a leading provider for this program. MSI patients in this area of the county are shared between the clinic and the hospital, receiving inpatient care at the hospital and clinical care at SOS. This efficient system minimizes hospitalization, freeing beds for additional patients, and provides the best use of limited healthcare resources in our community. Case managers at Hoag and at SOS provide a continuum of care for vulnerable Orange County residents, increasing the safety, health, and security of all Orange County residents.

The SOS Patient Advocate works closely with Hoag Community Medicine’s case managers and discharge planners to arrange the necessary appointments and insure

patients and reports arrive when and where scheduled. For Hoag's FY 2009, 2,673 patients were referred to Hoag Hospital and received 206 in house patient days. Extensive radiological, lab services, pathology services and specialty services were also provided. In addition to Hoag's charity care, over 150 private providers offered their services free of charge to SOS patients, 96% who are on staff at Hoag Hospital. The hospital also provides in kind pharmaceuticals, medical supplies, and financial support to SOS.

The relationship between SOS and Hoag makes an incredible system of care available to both SOS and Hoag patients. The total value of services offered by the medical community to SOS patients is more than triple the actual clinic budget. This is a tremendous statement of caring and belief in the importance of access to care for everyone, regardless of ability to pay. Hospital-clinic partnerships are not unusual, however, the level of cooperation and collaboration between SOS and Hoag is unique. As our nation continues to struggle with the economic crisis and spiraling healthcare costs, it is the hospital-clinic partnerships that will hold the safety net together and care for the rising ranks of the uninsured and medically vulnerable.

Contact: Margarita Pereyda, MD, SOS Medical Director at 949- 650-0186 or email mpereyda@shareourselves.org

Madres Militares

Rita Armendariz, the Eligibility Coordinator in the Department of Community Medicine, founded Madres Militares as a support group for local families of active duty military personnel. The group is modeled after another local group, Military Moms, and expands the reach of these services into the Spanish-speaking community of Orange County. This group, which currently includes 48 members, meets twice per month at SOS to share personal stories to alleviate feelings of isolation, helplessness and fear, and to listen to guest speakers on military policies and experiences.

Not all individuals are able to attend peer support group meetings and some may require assistance beyond the scope of a group support program. In these circumstances, the program provides personalized assistance and referrals and sometimes financial assistance for funeral arrangements and other urgent needs. Requests from family members may be as simple as assistance in finding out whom to contact to find out where their child is stationed, or as complex as locating resources for childcare or individual mental health counseling.

Madres Militares has provided consolation and comfort to its members in times of need, and the solidarity they share gives them strength to cope with what are sometimes very difficult circumstances.

Contact: Rita Armendariz, Eligibility Coordinator at (949)764-6279 or email rita.armendariz@hoaghospital.org
Alzheimer's Family Services Center

Founded in 1980, Alzheimer's Family Services Center (AFSC) has evolved from a social day care serving a handful of frail elders into a comprehensive center for the care of persons with Alzheimer's disease or another dementia. Licensed by the California Department of Public Health, AFSC is the only Alzheimer's Day Care Resource Center in Orange County. Across its thirty-year history, AFSC has progressively developed dementia-specific adult day health care (ADHC), a variety of support services to help caregivers manage the day-to-day challenges of care, and community dementia education and outreach services. Affiliated with the Hoag Neurosciences Institute, AFSC is also leading initiatives to improve hospital care of patients with dementia and enhance access of their families to community-based services after discharge. Similarly, for numerous partners in the community, such as the UCI Institute of Memory Impairments, and Neurological Disorders, AFSC provides a link to critical community-based services that families need after receiving a dementia diagnosis. Through its community- and hospital-based efforts, AFSC is transforming dementia care from a "nothing can be done" to a proactive approach—one family at a time. Most significantly, AFSC provides families with access to comprehensive solutions, experienced professionals who become partners in caring, and affordable, high-quality care that can be depended upon daily. Grounded in the latest research and clinical guidelines, AFSC's services include:

Dementia-Specific Adult Day Health Care (ADHC) - AFSC offers a comprehensive set of ADHC services tailored to the changing needs of persons from the earliest to most advanced stages of dementia. A state-of-the-art, dementia-specific facility with a secure perimeter; a high staff-to-participant ratio of 1:5; specialized programming, and expertise in dementia care differentiate ADHC services at AFSC from those available elsewhere in the county. In FY 08-09, an average of 87 participants daily received medical, rehabilitative, psychosocial, and nutritional ADHC services based on an individual plan of care within the context of a stimulating recreational program. All care is provided under the supervision of a medical director and coordinated with each participant's primary care physician. Through its extensive fund development efforts, AFSC is able to maintain affordability of ADHC services for families unable to afford the high cost of in-home or full-time facility care. Notably, AFSC has the expert capacity to continue care of participants who have been denied services at or discharged from sister centers due to difficult-to-manage behaviors such as wandering or aggressiveness. In FY 08-09, AFSC's services made it possible for 21 such participants to remain with their families at home for an extended period of time.

Caregiver Assistance - Care management support available to every caller at no cost includes information and referral, ad hoc telephone and in-person consultation, and relationship-building home visits designed to address high-risk situations (e.g., living alone). As partners in care, these professionals support the caregiver in developing solutions for everyday challenges ranging from difficult behaviors to physician communication. Our care managers also link families to services at AFSC or elsewhere, as appropriate, and provide support as needed to ensure a successful connection.

Caregiver Support Groups - Caregivers community-wide have access to 72 free support group sessions offered by AFSC in collaboration with the Alzheimer's Association of

Orange County on an annual basis. Support groups represent an important vehicle for caregivers to gain knowledge, skills and support from their peers as well as a professional leader. Caregivers learn successful strategies from others, try them, and return to “report in,” creating a continuous feedback loop.

Early Stage Groups - Awarded a 2009 National Health Information Award by the Health Information Resources Center, *JumpStart* is a free 6- to 8-week set of combined support and education sessions for early stage individuals and their care partners. Each two-hour session includes an hour-long educational discussion led by a local dementia expert (e.g., neurologist) followed by separate support groups for the affected and their care partners. To meet the need for ongoing support, *JumpStart* allows couples to reapply for additional sets of sessions for as long as the dementia-affected individual meets eligibility criteria.

Caregiver Counseling Services - Launched in April 2009 with support from the Pacific Life Foundation, short-term counseling services provide an “extra boost” when a caregiver needs focused support to develop and implement solutions for problems in care. Individual, family, and couples counseling is available to help address challenges such as family conflicts over care, negative emotions, depression, unhealthy caregiving styles, and difficult transitions (e.g., placing a loved one in long-term care). Following an initial consultation, caregivers typically receive 1 to 12 fifty-minute weekly sessions, based on clinical need, with follow-up sessions as needed to ensure gains made are not lost. Counseling services are offered on a sliding scale basis.

Caregiver Education - Access to accurate knowledge about dementia diagnosis, treatment, and care is critical to caregiver well-being. Caregiver education services are designed to empower attendees with essential knowledge and coping skills and, thereby, help attenuate caregiver risk for mental and physical health problems.

Community Education & Outreach - Dementia education and outreach services are designed to improve community health by addressing the lack of accurate information about dementia diagnosis, treatment, and available care-related services among at-risk seniors, families, and health care professionals. Education and outreach efforts range from classes for health care professionals to participation in health fairs and large community events countywide.

All services are provided by an expert staff of 42 professionals rich in cultural, linguistic, and professional diversity under the leadership of Cordula Dick-Muehlke, Ph.D., a licensed clinical psychologist and recognized expert in dementia care. As a leader in dementia care with a broad continuum of specialized services, AFSC is deeply embedded in the Orange County community, reaching 10,932 unduplicated individuals in FY 08-09 alone:

- 266 unduplicated elders received dementia-specific adult day health care, tailored to individual needs by a multidisciplinary clinical team that includes nurses, social workers, physical, occupational, and speech therapists, activity professionals, a dietician, a pharmacist, and a medical director.

- 525 callers benefitted from information and referral, supportive telephone and in-person counseling, and/or relationship-building home visits.
- 2,600 caregivers, at-risk seniors, and health care professionals gained knowledge and skills via 136 educational sessions.
- 7,461 community members learned about dementia and available services via 171 outreach activities.
- 92 caregivers learned from each other through 70 support group sessions, led by one of AFSC's dementia care experts.

Persons with Alzheimer's disease, their families, health care professionals, and the community at-large receive multiple benefits from services. Evaluations of ADHC, caregiver support, and education services in FY 08-09 yielded the following positive results.

- 89% of caregivers responding to the FY 08-09 adult day health care survey reported finding it easier to continue caring for a loved one since enrollment. Additionally, 88% reported being less stressed.
- 100% of caregivers responding to the FY 08-09 support group survey reported being better able to manage a loved one's care ($\bar{m} = 4.5$, on a scale of 1, strongly disagree, to 5, strongly agree) and being less depressed ($\bar{m} = 4.2$) as a result of attending.
- 96% of individuals attending education activities reported both increased knowledge ($m = 4.5$) about Alzheimer's disease and the intent to implement strategies learned ($m = 4.5$).

Under the leadership of Cordula Dick-Muehlke, Ph.D., executive director, the partnership AFSC has with Hoag Memorial Hospital Presbyterian is expanding. As a member of the Neurosciences Executive Team, Dr. Dick-Muehlke is helping develop a continuum of dementia-related services that span from diagnosis to community-based and hospital care. In FY 08-09, AFSC developed and helped implement a computer-based dementia training and education module for Hoag Hospital nurses and personal care assistants which resulted in Hoag receiving a prestigious 2009 Sum Total Innovation Award.

The hospital owns the AFSC facility and provides it at no charge, including maintenance services as specified in the lease, to the agency. Additionally, the hospital provides annual operating and transportation grants, and in-kind services such as facilities management and consultation in nursing and compliance-related issues to the center. The executive director and one dementia education specialist are members of the Department of Community Medicine, both out-stationed at AFSC.

Contact: Cordula Dick-Muehlke, Ph.D., Executive Director at (714) 593-1840 or email CDickMuehlke@AFSCCenter.org

The Mary & Dick Allen Diabetes Center

About eight percent of Americans have diabetes. One quarter of these individuals are undiagnosed. The total estimated cost of diabetes in the United States in 2007 was \$174 billion, including \$116 billion in excess medical expenditures and \$58 billion in reduced national productivity (Diabetes Care, March 2008). While diabetes alone is ranked as the sixth leading cause of death in the U.S., it also indirectly contributes to deaths by other causes, including cardiovascular disease, stroke and kidney disease (National Vital Statistics Report, CDC, 2006). Diabetes is also closely linked to other serious medical outcomes, including kidney failure, blindness, and leg and foot amputations.

The Mary & Dick Allen Diabetes Center at Hoag Hospital provides diabetes education and support services to adults at its Newport Beach location. The two principal services are the American Diabetes Association-accredited Diabetes Self Management Education (DSME) and State of California Diabetes and Pregnancy Program-affiliated Sweet Success program for women with gestational diabetes. Community and Medical Professional Education are also critical components of our services.

The Center has partnered with CHOC (Children's Hospital of Orange County) to provide bilingual clinical services, education, and support for children diagnosed with diabetes, and outreach, educational screening for children considered at risk for developing diabetes.

In response to the near epidemic growth in diabetes cases, the Center is undertaking some significant steps:

1. Expansion of the existing services provided to adults, into a comprehensive care service, through the incorporation of on-site physician sub-specialties (Endocrinology, Podiatry, Ophthalmology) via a *1206D clinic* model;
2. Implementation of a state of the art electronic health care record capable of integrating with the electronic superhighway for medical information systems
3. Expansion of the class curriculum to include Medical Nutrition Therapy, Pharmacy Services, and expanded Psychosocial Support Services;
4. Design and implementation of programs aimed to serve the special needs of young adults with diabetes ages 18-30 transitioning into independent adulthood;
5. Collaboration with universities to design and participate in research activities;
6. Development of specific community outreach activities, aimed at vulnerable and underserved residents with diabetes or at risk for diabetes.

Contact: Beryl Manasevit RN, MN, Director at 949-764-6241 or email Beryl.Manasevit@Hoaghospital.org

Newport Mesa Unified School District

Hoag Hospital collaborates with the Newport Mesa Unified School District providing a grant to support staffing at the HOPE Clinic, a school based health center. The HOPE Clinic is a program of Health Services and participates in the Child Health and Disability Prevention Program and the Vaccines for Children Program. Children and families who receive services at the clinic are not charged. Health promotion and well child exams are the cornerstone of the program.

The primary focus is to promote wellness and prevent illness through periodic well child exams and routine immunizations. Services are free and provided by a bilingual Spanish-speaking staff. The HOPE Clinic offers guidance and support to families looking for a variety of health services including developmental assessments, parent education and anticipatory guidance, assistance with insurance enrollment and referrals to medical and social support services. The clinic staff are employed by the district and are familiar with district services and school requirements, which is an advantage because the staff are able to assist families in meeting those requirements for school participation.

The HOPE Clinic is unique in that it is a school based health center located in a community school setting. It is housed on a campus with an elementary school, district run preschool, a Head Start Program, an adult education center run by the district, two after school programs including the Boys and Girls Club and SOY, an after school program to prevent gang involvement, and the community theatre. The HOPE Clinic is staffed with Nurse Practitioners with a supervising physician, an Office Assistant, Community Facilitator, Health Assistant, and an Ameri-Corps VISTA Volunteer.

This past year economic times grew tougher and many unmet needs came to the forefront. As a result of support from collaborative partners such as Hoag Hospital, the HOPE Clinic was able to tailor services in response to community needs. As obesity skyrocketed in youth, and concerns about our community's mental health status took on more attention, HOPE Clinic added services, allowing us to reach many more children and families. A collaborative arrangement with the Orange County Health Care Agency resulted in the Women, Infant, & Children (WIC) nutrition program being offered on site. In addition, a Children's Wellness Program collaborated with HOPE Clinic offering medical care, nutrition counseling, case management, education, and fitness programs for youth. Hoag's Community Medicine Counseling Program has provided MSW counselors on site to offer mental health services two half days per week.

During FY 2009, the HOPE Clinic provided well over 4700 distinct services including 1352 child health exams, over 1774 child immunizations, and 846 developmental assessments. Approximately 890 children received insurance assistance. HOPE Clinic provides some services to adults including Tuberculosis testing for employees and district volunteers, Hepatitis B vaccines for employees, and flu vaccine for children, families, and members of the local community. In FY 2009, 824 adults received Tuberculosis screening. The Tuberculosis screening is required for members of the community who wish to volunteer at the school. Approximately 1,035 children and adults received the flu vaccine along with health education during specialty clinics held beyond regular clinic hours. During clinic hours, 496 flu vaccines were delivered. Additionally, in FY 2009

the clinic services were complimented by a bilingual Community Facilitator who provided 60 targeted parent education classes. In addition, the Community Facilitator was actively engaged in community education, coordinating health fairs, outreach, translation, linking children and families to resources, and case management.

YMCA

During FY 2009, the YMCA of Orange County, Community Services Division received funding from Hoag Hospital to support the work in the area of bilingual mental health counseling services for uninsured and under-insured children under the age of 5, inclusion support services for children with developmental disabilities in afterschool programs, mentoring programs for children in the foster care system, bilingual developmental screening and early prevention/intervention programs for uninsured and under-insured children under the age of 5, support services for adults with developmental disabilities, and bereavement support for families who have suffered the loss of a child. All of these YMCA Community Services programs are offered throughout the county including the high-need communities of Santa Ana and Costa Mesa. In 2008/2009 the program areas covered include:

- **YMCA Early Childhood Program (ECP)** – Bilingual mental health services provided by a Child Family Marriage Therapist (MFT) to children and families who are uninsured or MediCal eligible children at center-based childcare facilities throughout the county to 50+ families.
- **YMCA Mentoring** – 356 children in the foster care system were matched with over 300 volunteers through monthly “Fun Days,” academic mentoring and one-on-one community mentors. Children may participate in one or any combination of the three programs if they currently are, or have been in the foster care system. This includes children in kinship care, as well as children who have already been adopted.
- **Y Inclusion** - Inclusion services to 68 children with developmental disabilities by:
 1. Assessing the needs of the child within their existing childcare environment
 2. An Inclusion Plan designed to successfully “include” the child within their existing childcare environment
 3. One-to-One (up to 1-4) inclusion support for the child within their childcare environment
 4. Inclusion training for Inclusion Facilitators and after school staff
 5. Monitoring of the progress of participants and feedback to the Y-Inclusion Team
- **YMCA Childcare Health Consultation (CHC)** – Provides training to childcare providers and parents on a variety of topics to help prepare young children for school. In addition to training, CHC also provides:
 1. Developmental observation / assessment of child
 2. Phone consultation to parents and childcare providers
 3. Community outreach

- **YMCA New Horizons** – Provides social and recreational programming for over 300 adults with developmental disabilities throughout the county. In addition to providing the social skill training to the individuals who participate in the program, New Horizons also provides a period of much needed “respite” for the families who care for the adult with a disability.
- **YMCA Bereaved Parent Program** – This much needed peer to peer support program helps over 100 families per year through the process of grief over the loss of a child. At our weekly meeting we support people by offering assurance that they are not alone and help them on their journey to find comfort.

Orange County Health Care Agency

A strong collaborative with the Orange County Health Care Agency has been integral to Hoag’s Community Benefit efforts. Hoag has committed significant funds in support of the Health Care Agency’s Child Abuse Services Team (CAST). CAST is a multi-disciplinary team program for conducting child abuse investigations, especially sexual abuse investigations, at a single site. The program’s coordinated on-site services have enabled social services, law enforcement, deputy district attorneys, medical providers, and therapists to collaborate in investigations. The child-focused environment at CAST serves to reduce further trauma for these children and to enhance the investigation.

Hoag provides the funding support for a forensic pediatrician for the CAST program. The role of this pediatrician has been widened starting July 1, 2009 to emphasize collaboration with medical providers to improve the identification, reporting and quality of examinations provided by physicians for suspected child abuse victims. This pediatrician holds an academic appointment at the University of California, Irvine (UCI) and also trains physician residents.

Highlights from the CAST program include:

- 1,078 activities during FY 2009
 - Exams for 126 suspected sexual abuse victims and 39 for suspected physical abuse (and 88 follow-up exams)
 - 29 sexual abuse exams done for medical indications and not for legal prosecution
 - 64 consults in hospitals for suspected victims, 125 reviews of medical records and 64 telephone consults with emergency response social workers and community physicians
 - 49 lectures or trainings were given and 20 were attended; 12 lunch & learn meetings and 54 sessions with pediatric and family medicine residents
 - 128 case conferences
 - 14 expert court witness and 83 subpoena activities
- Regular meetings occurred with the CHOC child abuse pediatric expert and the County-contracted physician expert. Cases were reviewed and efforts planned to improve the quality of care delivered to suspected child abuse victims in many medical settings in the County.

The vision of the task force of key community and public agency stakeholders and community forum that met in 2008 led to the revision of the Scope-of-Work of the pediatrician with the enhancement noted above

Senior Transportation

The Community Benefit Program collaborates with seven community senior centers for transportation services for their program participants. These organizations offer a broad range of services including congregate meals, health screenings, educational, social and physical activities for their participants. In providing transportation services for seniors, we assist them in their efforts to sustain good mental and physical health, and to maintain their independence. The seniors use the transportation services to attend doctor appointments, shop and do errands, and participate in group social activities. The seven organizations served are: Alzheimer's Family Services Center; Costa Mesa Senior Center; Huntington Beach Council on Aging; Irvine Adult Day Center; Bubbe & Zayde's Jewish Community Senior Center; Newport Beach's Oasis Senior Center; and South County Senior Services. Total Hoag expenditures on transportation for approximately 110,000 senior passenger trips in FY 2009 was \$500,700.

Appendices

- Appendix A** **Hoag Hospital Charity Care and Self Pay Discount Policy (page 27)**
- Appendix B** **Hoag Hospital Quantifiable Community Benefit for FY2009 (page 32)**
- Appendix C** **Hoag Hospital Community Benefit Expenditures by Program (page 33)**

Appendix A

HOAG MEMORIAL HOSPITAL PRESBYTERIAN HOSPITAL POLICY		Number: 9.10	Page: Page 1 of 5
		Effective Date: 01/23/09	
		Supersedes (Date): 04/08/08	
		Original Date: 12/01/70	
Signatures of Policy Reviewers (*as required):			
Director _____ Kevin Don	Executive Director _____ Bret Kelsey	Sr. Vice President & CFO _____ Jennifer Mitzner	
President & CEO: _____ Richard Afable, MD			
Title/Subject: Charity Care and Self Pay Discount Payment Policy			

1.0 PURPOSE:

- 1.1 A significant component of Hoag Hospital's mission is to provide care for patients in times of need. Hoag provides charity care as a benefit to our community as a not-for-profit hospital. Hoag is committed to assisting low-income and/or uninsured eligible patients residing within its community through well-communicated and appropriately implemented discount payment and charity care programs. All patients will be treated fairly, with dignity, compassion, and respect.
- 1.2 Financial assistance policies must balance a patient's need for financial assistance with the hospital's broader fiscal stewardship.
- 1.3 Outside debt collection agencies and the hospital's internal collection practices will reflect the mission and vision of the hospital.
- 1.4 Financial assistance provided by Hoag Hospital is not a substitute for personal responsibility. It is the responsibility of the patient to actively participate in the financial assistance screening process and where applicable, contribute to the cost of their care based upon their individual ability to pay.

2.0 POLICY:

- 2.1 Hoag Hospital provides financial assistance to patients who do not have insurance coverage at family income levels up to four times the Federal Poverty Income Guidelines. The Hospital gives consideration to eligible patients residing within its community and to patients, whether or not they have insurance and regardless of income level if there are exceptional circumstances.

- 2.2 Business services staff will discuss program options with patients who have expressed a need for financial assistance in resolving their hospital bills.
- 2.3 Qualifying patients are referred to MSI or Medi-Cal and those not eligible are reviewed for Patient Assistance under Charity Care. Adjustments are made based upon the patient's eligibility level in the programs.
- 2.4 Any patient seeking financial assistance (or the patient's legal representative) shall provide information concerning health benefits coverage, financial status, and any other information that is necessary to make a determination regarding the patient's status relative to the hospital's charity care policy, discounted payment policy, or eligibility for government-sponsored programs. Confidentiality of information and the dignity of the individual will be maintained for all that apply for charitable services.
- 2.5 Charity guidelines will be reviewed and adjusted annually according to the Federal Poverty Guidelines established by the Department of Health and Human Services (see FPL Table below).
- 2.6 Hoag Hospital will define the standards and scope of practices to be used by its outside (non-hospital) collection agencies, and will maintain written agreements from such agencies that they will adhere to such standards and scope of practices.
- 2.7 Hoag Hospital, or outside agencies operating on behalf of the hospital shall not, in dealing with low-income uninsured patients who are at or below 200% of the Federal Poverty level, use wage garnishments or foreclosure of liens on primary residences as a means of collecting unpaid hospital bills. This requirement does not preclude Hoag Hospital from pursuing reimbursement from third party liability settlement or tortfeasors or other legally responsible parties.
- 2.8 Patients who have an application pending for either government-sponsored coverage or for Hoag Hospital's own charity care and financial assistance, will not knowingly be referred to a collection agency prior to 120 days from the date of discharge or date of service.
- 2.9 At the time of billing, Hoag Hospital will provide to all low-income uninsured patients the same information concerning services and charges provided to all other patients who receive care at the hospital.
- 2.10 Patients who have been denied charity care or other discounts may appeal the denial, in writing, within 10 days of receiving the denial. The appeal should include supporting documentation and evidence as to why the appeal is being following address:

Hoag Memorial Hospital
One Hoag Drive, P.O. Box 6100
Newport Beach, CA 92658-6100
Attention: Director PFS, Business Services

The patient's appeal will be considered and a response with the decision will be mailed to the patient within 10 days of receiving the appeal. All decisions of the Director will be considered final and additional appeals will not be permitted.

3.0 DEFINITION OF CHARITY CARE SERVICES AND PATIENT ASSISTANCE SERVICES:

- 3.1 Charity Care may be provided for the following:
 - 3.1.1 Patient services provided to uninsured patients who qualify for financial assistance based on the hospital's charity care policy.
 - 3.1.2 Underinsured patients who indicate an inability to pay their unpaid balance may be screened for possible financial assistance.
 - 3.1.3 Uninsured patients, who can pay for part of their care, but indicate an inability to pay the remainder.
- 3.2 Charity Care Excludes:
 - 3.2.1 Elective services are generally not eligible for consideration under the Charity Care program.
 - 3.2.1.1 Certain specialty services are excluded. Following are a few examples: CDU, cosmetic and gastric bypass services.

4.0 CHARITY CARE ELIGIBILITY REQUIREMENTS:

- 4.1 The following factors will be considered when determining the amount of charity write-off provided.
- 4.2 Patient should reside in hospital's primary or secondary service area or have received emergency or specialty services.
- 4.3 Uninsured patients at or below 400% of the Federal Poverty Income Guidelines are eligible to apply for financial assistance under Hoag Hospital's Charity Care Discount payment policy (see Table below).
- 4.4 Evidence of eligibility will be requested and must be provided if patient/family are available. Patients should be screened for charity care prior to admission, at time of admission, or as soon as possible following treatment.
- 4.5 Additional considerations will be made such as:
 - 4.5.1 employment status,
 - 4.5.2 family size,
 - 4.5.3 certain living expenses of a reasonable and necessary nature,
 - 4.5.4 amount and frequency of hospital and other health care bills, and
 - 4.5.5 assets and liabilities.
- 4.6 All payment resources must first be explored and applied to health care expenses including third party payers, Medicare, Medi-Cal, Cal-OPTIMA, MSI, and Victims of Crime.
 - 4.6.1 If a patient is eligible for Medi-Cal, any charges for Days of Service Not Covered by the patient's coverage may be written off to charity without a completed financial statement. This does not include any Share of Cost (SOC) amounts that the patient must pay before the patient is eligible for Medi-Cal.
 - 4.6.2 Patients unable to pay the total billing for specialty services not covered by their insurance may be considered for charity coverage for a portion of the cost.

4.6.3 Patients unwilling to disclose any financial information during charity screening or Medicare/Medi-Cal screening will not be processed as charity care.

5.0 CHARITY CARE DISCOUNT:

2009 HHS Poverty Guidelines						
Up to 400% FPL = Discount to 125% Medicare DRG Rate						
Up to 350% FPL = Discount to Medicare DRG Rate						
Up to 200% FPL = 100% Charity Write Off						
Size of Family	Gross Yearly 100% of FPL	Gross Yearly 200% of FPL	Gross Yearly 300% of FPL	Gross Yearly 350% of FPL	Gross Yearly 400% of FPL	** For Each Add'l Person Add
1	\$ 10,830	\$ 21,660	\$ 32,490	\$ 37,905	\$ 43,320	\$ 3,740
2	\$ 14,570	\$ 29,140	\$ 43,710	\$ 50,995	\$ 58,280	\$ 7,480
3	\$ 18,310	\$ 36,620	\$ 54,930	\$ 64,085	\$ 73,240	\$ 11,220
4	\$ 22,050	\$ 44,100	\$ 66,150	\$ 77,175	\$ 88,200	\$ 14,960
5	\$ 25,790	\$ 51,580	\$ 77,370	\$ 90,265	\$ 103,160	\$ 18,700
6	\$ 29,530	\$ 59,060	\$ 88,590	\$ 103,355	\$ 118,120	\$ 22,440
7	\$ 33,270	\$ 66,540	\$ 99,810	\$ 116,445	\$ 133,080	\$ 26,180
8	\$ 37,010	\$ 74,020	\$ 111,030	\$ 129,535	\$ 148,040	\$ 29,920
* Patients who qualify for Charity services but are > 200% FPL will be given a 60% discount for Outpatient Services						
** For families with more than 8 persons, add \$3,740 for each additional person.						

6.0 SELF-PAY PATIENT DISCOUNTS ELIGIBILITY REQUIREMENTS:

6.1 Patients who do **NOT** qualify for Charity Care under Hoag Hospital's Charity program in accordance with Sections 4.0 and 5.0 above, and who do not have insurance or who have inadequate insurance coverage and are considered "Self-Pay" will be eligible for a Prompt Payment discount.

6.1.1 Excludes cosmetic and other specified cash programs.

6.1.2 Prompt Payment discount requires full payment is made at the time of service or within 30 days of discharge or date of service unless other arrangements have been made.

6.1.3 Patients who qualify for a discount **MUST** make a full deposit of estimated charges at the time of, or prior, to receiving services in order to qualify for the discount.

6.1.4 Unless other payment arrangements have been made, patients will be billed for the remainder of their balance due and the balance must be paid in full within 15 days of receipt of the bill. If payment is not received within 15 days, the discount will be removed and the full billed charges will be due and payable upon receipt.

7.0 SELF-PAY DISCOUNT:

7.1 35% off charges for Prompt Payment, as defined in section 6.0 above.

Multidisciplinary Review:

Review and/or input were given by the following: **Administration; Business Services**

Policy Originator: Business Services

Reference:

Filename: 9.10 Charity Care

Appendix B

Hoag Hospital Quantifiable Community Benefit Summary Trend FY08- FY09

A. Unreimbursed Cost of Direct Medical Care Services - Charity Care

Definition: The direct cost of medical care provided by Hoag; consists of unreimbursed costs (calculated utilizing cost-to-charge ratios) of providing services to the county indigent population, charity care, and care provided to patients identified and referred by the SOS Free Medical and Dental Clinic and the Hospital's Community Case Management Program.

	FY2009	FY2008
Medical Services Indigent (MSI)	\$ 5,434,000	\$ 5,074,000
Charity Care	\$ 6,851,755	\$ 5,939,005
Community Case Management and SOS Free Clinic Referrals	\$ 1,389,712	\$ 1,511,995
MediCal/Cal Optima Cost of Unreimbursed Care	\$ 8,029,000	\$ 5,704,000
Medicare Cost of Unreimbursed Care	\$ 47,059,000	\$ 54,003,444
Total Cost of Unreimbursed Direct Medical Care Svcs	\$ 68,763,467	\$ 72,232,444

B. Benefits for Vulnerable Populations

Definition: Services and support provided to at-risk seniors and children, the indigent, uninsured/underinsured and homeless to facilitate access to preventive and immediate medical care services.

Community Health Services	\$ 4,208,068	\$ 3,945,403
Health Profession Education	\$ 30,930	\$ 30,588
Subsidized Clinical Specialty Services	\$ 680,756	\$ 531,830
Cash and In-Kind Contributions	\$ 2,193,604	\$ 1,324,704
Community Building Activities	\$ 17,324	\$ 10,000
Community Benefit operations	\$ 806,983	\$ 734,529
Total Benefits for Vulnerable Populations	\$ 7,937,665	\$ 6,577,054

C. Benefits for the Broader Community

Definition: Health education, prevention and screening programs, information and referral services, and supportive services available to community residents.

Community Health Services	\$ 1,160,148	\$ 1,291,141
Health Profession Education	\$ 554,415	\$ 312,871
Subsidized Clinical Specialty Services	\$ 1,082,183	\$ 1,256,705
Cash and In-Kind Contributions	\$ 256,296	\$ 209,999
Community Building Activities	\$ 116,900	\$ 138,650
Foundation Expenditures for Community Benefit	\$ 3,550,253	\$ 2,429,458
Total Benefits for the Broader Community	\$ 6,720,195	\$ 5,638,824

Total Community Benefit and Economic Value	\$ 83,421,327	\$ 84,448,322
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Total Community Benefit and Economic Value (excluding Medicare Cost of Unreimbursed Care)	\$ 36,362,327	\$ 30,444,878
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Notes:

1. Cost of care figures (section A) are estimated, based upon annualized results of 9 months of operations.
2. The 2008 Fiscal Year included 13 months: September 1, 2007 through September 30, 2008
3. The 2009 Fiscal Year included 12 months: October 1, 2008 through September 30, 2009

Appendix C

Benefits for Vulnerable Populations

Net CB Expenditure

Community Health Improvement Services

Alzheimer's Family Services Center	\$	1,141,721
Community Case Management	\$	185,651
Community Mental Health Services	\$	503,644
Community Mobile Meals Programs	\$	20,958
Employees for Local Community Non-profits	\$	728,292
Equipment Loan Program-Senior Center	\$	891
Lifeline	\$	6,316
Senior Transportation (7 agencies)	\$	500,700
SOS Clinic	\$	1,077,595
Valve Screening for Seniors	\$	42,300
Total Community Health Services	\$	4,208,068

Health Professions Education

Social Work Internship Program	\$	30,930
Total Health Professions Education	\$	30,930

Subsidized Clinical Specialty Services

ECU Call Panel	\$	680,756
Total Subsidized Clinical Specialty Services	\$	680,756

Cash and In-Kind Contributions

Access California Services	\$	25,000
AIDS Services Foundation	\$	30,000
American Lung Association	\$	12,500
California Kids Healthcare Foundation	\$	716,933
Casa Teresa	\$	40,000
Costa Mesa Senior Center	\$	22,037
El Sol Academy	\$	25,000
Food Donations	\$	12,173
Healthy Smiles for Kids OC- Dental	\$	10,000
Hispanic Chamber of Commerce Educational Foundation	\$	5,000
Human Options	\$	53,500
Illumination Foundation	\$	15,000
Latino Health Access	\$	25,000
MOMS Orange County	\$	16,500
Newport Mesa School District	\$	156,294
Newport Mesa Schools Foundation	\$	5,000
Oasis Senior Center	\$	500,000
Orange Coast Interfaith Shelter	\$	20,000
Orange County's United Way	\$	108,767
PADRE Foundation	\$	5,000
Providence Speech and Hearing Center	\$	50,000
Santa Ana Unified School District	\$	3,000

Benefits for the Vulnerable Populations (continued)

Save Our Youth (SOY)	\$	17,000
Serving People in Need (SPIN)	\$	1,500
Someone Cares Soup Kitchen	\$	34,900
South County Senior Services	\$	60,000
Trauma Intervention Program	\$	20,000
WISE Place	\$	20,000
YMCA Community Services	\$	157,500
Youth Employment Services	\$	26,000
Total Cash and In-Kind Contributions	\$	2,193,604

Community Building Activities

Project SEARCH	\$	17,324
Total Community Building Activities	\$	17,324

Community Benefit Operations

Community Medicine Operations	\$	238,742
Dedicated Staff	\$	568,241
Total Community Benefit Operations	\$	806,983

Total Benefits for Vulnerable Populations **\$** **7,937,665**

Benefits for the Broader Community**Net CB Expenditure*****Community Health Improvement Services***

Better Breathers Support Groups	\$	4,650
Breast Cancer Outreach and Support Groups	\$	5,040
Cancer Center Education and Support Groups	\$	261,004
Corporate Communications Community Outreach	\$	240,937
Community Education Presentations	\$	6,647
Diabetes Education and Support Groups	\$	3,734
Enterostomal Outpatient Services	\$	3,899
First Aid Stations at Community Events	\$	3,525
Flu Immunization Clinic Expenses	\$	161,233
Health Ministries Program	\$	197,676
Madres Militares Support Group	\$	2,500
OB Education	\$	140,541
Parkinsons Community Support Programs	\$	1,000
Pastoral Care Education and Support Groups	\$	43,345
Perinatal Loss Support Group	\$	3,360
Pharmacy Presentations at Pulm/CHF Groups	\$	2,080
Physical Therapy Education and Support Groups	\$	1,426
Project Sun Safe	\$	22,749
Project Wipeout	\$	50,722
Smoking Cessation Programs	\$	4,080
Total Community Health Services	\$	1,160,148

Health Professions Education

Clinical Care Extender Program	\$	190,602
Hospital Case Management Internships	\$	36,527
Laboratory Internships	\$	61,840
Pharmacy Student Clinical Rotations	\$	16,500
Physical Therapy Internships	\$	22,800
Paul Merage School of Business-UCI	\$	200,000
Medical Education-Grand Rounds	\$	26,146
Total Health Professions Education	\$	554,415

Subsidized Clinical Specialty Services

Anticoagulation Clinic	\$	895,738
ETOH/Psych/Ancillary Patient Transfer Program	\$	186,445
Total Subsidized Clinical Specialty Services	\$	1,082,183

Cash and In-Kind Contributions

211 Orange County	\$	50,000
American Diabetes Association	\$	5,000
American Heart Association	\$	7,500
Corona Del Mar Chamber of Commerce	\$	10,000
Girls Inc.	\$	15,050
Goodwill of Orange County	\$	60,000

Benefits for the Broader Community (continued)

Health Care Council	\$	6,000
Juvenile Diabetes Research Foundation	\$	12,000
Kenya Medical Mission	\$	59,746
Orange County Human Relations Commission	\$	5,000
Susan Komen Race for the Cure	\$	1,000
The Center Orange County	\$	25,000
Total Cash and In-Kind Contributions	\$	256,296

Community Building Activities

Coalition of OC Community Clinics	\$	50,000
Community Disaster Preparedness Planning	\$	45,400
Health Funders Partnership	\$	20,000
County Health Executives Association of CA	\$	1,500
Total Community Building Activities	\$	116,900

Total Foundation Expenditures

see summary on next page

\$ 3,550,253

Total Benefits for the Broader Community **\$ 6,720,195**

Foundation Expenditures for Community Benefit

Net CB Expenditure

Community Health Services

Cancer Center Medical Director	\$	100,000
Chemical Dependency Scholarships	\$	78,066
Diabetes Center Community Programs	\$	1,993,142
Project Wipeout	\$	275
Breast Cancer Medical Director	\$	50,000
Womens Health Services Medical Director	\$	50,000

Total Community Health Services \$ **2,271,483**

Health Professions Education

Nursing professorships	\$	675,000
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Total Health Professions Education \$ **675,000**

Clinical Research

Breast Cancer Study	\$	2,300
Cancer Center Cell Biology Lab	\$	601,470

Total Clinical Research \$ **603,770**

Total Foundation Expenditures for Community Benefit \$ **3,550,253**

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