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Walking the Walk: Building a Lasting Legacy of Orthopedic Excellence

The founders of the Hoag Orthopedic Institute reflect on its “privademic” model, the mission to expand and the importance of philanthropy in that endeavor.

“Who foresaw then what this campus was going to become?” Dr. Alan Beyer pondered of a storied past that includes him, Drs. James Caillouette, Carlos Prietto and Robert Gorab, founders of the Hoag Orthopedic Institute. “What’s happened in 12 years here, thanks to the community, thanks to the administration at Hoag and thanks to the physicians, it’s absolutely mind-boggling.” There is a recurring word that permeates the narrative of any conversation about Hoag Orthopedic Institute: different. This desire to stand out is what has made the institute successful, its founders say. That was the vision, and it’s still the mission.

A New Model

With decades of orthopedic surgery experience between them and a long history of knowing each other, Drs. Beyer, Caillouette, Gorab and Prietto set out to create a venture combining their passions for delivering exceptional support to not only patients but future generations of orthopedic professionals. “We wanted more of what we’re going to call a ‘privademic’ model,” said Dr. Caillouette, Joan & Andy Fimiano Endowed Chair in Orthopedic Surgery. In this model, physicians at the institute can research and teach but also perform surgeries and care for patients.

A venture between orthopedic specialists and the community hospital—where governance and a commitment to service are shared—was and still is unique in the national market. Despite enormous obstacles, including the 2008 financial crisis and Affordable Care Act restrictions, Hoag’s board and administration committed to



this new model. This risk opened doors that led the way for everything the institute has become.

In 2010, the institute opened its doors to those in need of orthopedics and spine clinical care. It took an investment of time, talent and philanthropic funds from its founders, a trend that continues to this day. “The doctors, all of the founders and many others have committed funds personally to get that off the ground,” said Dr. Caillouette. Both Dr. Caillouette and Dr. Gorab have endowed chairs and use funds from those toward the fellowship program, which has become a prominent institute offering.

Building the Future

When people talk about innovation in orthopedics, they often think about the next instrument or tool. But the institute’s most innovative product is people, said Dr. Prietto. “It’s the fellows, it’s the nurses, it’s the people doing the research,” he said. “We have innovative minds, and that’s what we need support for. Funding the fellowships funds the thinking.” Each year, the institute names fellows, many funded by philanthropy. For the 2022-2023 academic year, the institute’s five fellows will be completing the program in either arthroplasty, sports medicine or health policy and management. The institute’s renowned surgeons serve as faculty to the fellowship programs, donating their time to teach advanced skills and provide mentorship.

“If you’re blessed enough to do the kind of things that we do, you give back,” Dr. Prietto said. “Educating the next generation is important. There’s nothing better than

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An IRA Charitable Rollover Gift:

May satisfy your annual required minimum distribution, or RMD, up to the amount of your gift



Allows you to give from pre-tax assets, and your distribution is excluded from taxable income



Helps avoid limits on charitable deductions and prevents you from being pushed into a higher tax bracket



Simplifies the giving process. It's easy to do — just notify your IRA custodian



Minimizes the effect your giving has on your cash flow. The gift is from your assets, not your checkbook



72 or older

Direct up to
\$100,000



Reduce Your Tax Burden Even if you don't itemize

Do you own an IRA or other qualified retirement plan? Are you looking for a tax-wise strategy to make gifts to support Hoag? If so, consider making an IRA charitable rollover gift.

At your direction, the custodian or trustee of your IRA can transfer money from your IRA directly to a qualified public charity, like ours, so that you can support the causes that matter most to you. This gift is a qualified charitable distribution (QCD), also called an IRA charitable rollover gift. An IRA rollover has several significant tax advantages. It allows you to give from pre-tax assets. If you do not itemize or are subject to charitable deduction limits, the IRA rollover still allows you to give while receiving tax benefits. An IRA rollover gift could also help you avoid income that could push you into a higher tax bracket.

Call (949) 764-7206 or email Julie.Heggeness@hoag.org for a complimentary, no-obligation look at the tools and strategies Hoag has to help you reach your goals.

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SOAR in the NEW YEAR

Fly high with your estate planning

A new year is about to take off. It is a time for a fresh flight of new hope and clear skies. Whether you are flying to a vacation, business meetings or volunteer opportunity, or if you are traveling only in your mind, the new year lies ahead. Pilots begin with a checklist — so should you.

Here is a good place to start on your estate planning this year:



Write or update your will



Check with your bank and investment advisor to update your transfer on death forms



Take inventory of your highly appreciated assets and use them, rather than cash, to transfer gifts to charity

Fly high above life's uncertainties with these ideas and others. For example, call or email us to see how a gift annuity pays you fixed income for life at attractive rates while also giving you an income tax deduction or how an IRA charitable rollover can help you lower your taxes on IRA distributions.

Do you have a plan for the future?

We look forward to helping you create a plan that addresses your unique needs and goals at every life stage.

Take advantage of a great resource to help you in your planning. Our website includes a number of valuable tools, including informative videos, the online Wills Planner and a downloadable guide to planning your will or trust.

To download your free wills guide, please visit our website at HoagHospitalFoundation.org/GiftPlanning

If you would like to get started creating or updating your charitable plan, please give us a call at (949) 764-7206 or email Julie.Heggeness@hoag.org.

having your student accomplish and be better than you.” The fellowship programs are highly sought-after and have garnered recognition as elite post-residency orthopedic training centers across the country.

Elevating Patient Care

Specialization is a major tenet of the Hoag Orthopedic Institute model. Dr. Beyer calls it a “focus factory,” which is crucial for better patient outcomes and experiences. “When you want to have a specialized procedure done, you want to have someone who has done it a lot,” he said. “But it’s not just the surgeon; it’s the scrub tech and everyone else involved in that procedure.” Nurses at the institute focus solely on orthopedics, mirroring the expertise of the surgeons to ensure a patient’s smooth journey. That translates into elevated patient experiences, whether in the operating room or at the bedside.

Philanthropy has supported the fostering of knowledge in Hoag Orthopedics, funding research coordinators, fellowships and more, continuing the legacy of focused specialization that runs deep at the institute. This culture of service is woven into the fabric of the institute, kicked off by its founding physicians who feel the duty to give back for the good of today and tomorrow, Dr. Beyer said. “When somebody helps you and you’ve achieved what you want to achieve and are in the position to pass it on, that’s what you do,” he said.

The institute’s elevated and focused care is a draw for staff and patients alike, and the founders are determined that this trend continues. “Our goal is that no one has to migrate from Orange County for anything orthopedic care. We

want to be able to say that we’ve got everything covered,” said Dr. Beyer.

Growing the Legacy

The founders acknowledge the successes of the past 12 years, yet they also count the goals that still lay ahead. With each fellow or researcher that comes through the institute, Dr. Gorab, Tom & Mayumi Adams Endowed Chair in Orthopedic Surgery, sees the trove of skills and tools they gain. “Our fellows come here specifically to learn certain techniques and approaches, then they take that with them to hospitals and patients,” he said. “If you think about the impact of philanthropy on the contributions we’re making to society, it’s very impactful.”

There is a crucial need to keep the emphasis of the institute on education and research. So much so that the institute gives a percentage of its profits back to the organization to support research and education. “Data mining, research, developing ideas...all of that takes time and resources,” Dr. Gorab said. He, like his colleagues, sees the return of their philanthropic investments and those of others who’ve shared their vision. “We need to grow even more to expand every subspecialty of orthopedics,” he said. On the horizon, they see programs for foot, ankle and hand surgeries and spaces to focus on sports performance and biometrics.

Hoag Orthopedic Institute physicians and the team they’ve assembled have the vision, talent and drive to make those programs, and more, a reality. What these goals will thrive on is community support. What comes with high rankings, outstanding patient outcomes and a prominent “privademic” model is the encouragement to expand it.

Hoag’s Milestones are Your Milestones.

Thank You.

Your dedication to Hoag and the well-being of the community shaped a legacy that has spanned 70 years. Due in large part to the innovative programs and best-in-class technology provided by philanthropy, Hoag was once again the highest ranked hospital in Orange County in 2022-2023 by the *U.S. News & World Report*. This marks the sixth year in a row Hoag has achieved this level of recognition.



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