



**Annual Report and Plan for Community Benefit  
MemorialCare Saddleback Medical Center  
Fiscal Year 2019 (July 1, 2018 - June 30, 2019)**

**Submitted to:  
Office of Statewide Health Planning & Development  
Healthcare Information Division  
Accounting and Reporting Systems Section  
Sacramento, California**

**November 2019**

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## About the Organization

### Mission

To improve the health and well-being of individuals, families and our communities.

### Vision

Exceptional People. Extraordinary Care. Every Time.

### Values

#### *The iABCs of MemorialCare*

The iABCs are a statement of our values—Integrity, Accountability, Best Practices, Compassion and Synergy. They remind us of our commitment to the highest standard of patient care and the active communication of clinical outcomes.

#### **Integrity**

Always holding ourselves to the highest ethical standards and values. Doing the right thing, even when no one is watching.

#### **Accountability**

Being responsible for meeting the commitments we have made, including ethical and professional integrity, meeting budget and strategic targets, and compliance with legal and regulatory requirements.

#### **Best Practices**

Requires us to make choices to maximize excellence, and to learn from internal and external resources about documented ways to increase effectiveness and/or efficiency.

#### **Compassion**

Serving others through empathy, kindness, caring and respect.

#### **Synergy**

A combining of our efforts so that together we are more than the sum of our parts.

### MemorialCare

MemorialCare is a nonprofit integrated health care delivery system that includes four<sup>1</sup> hospitals – Long Beach Medical Center, Miller Children's & Women's Hospital Long Beach, Orange Coast Medical Center, and Saddleback Medical Center; award-winning

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<sup>1</sup> Due to an active earthquake fault line under the hospital and California's impending seismic regulations for acute care hospitals, Community Medical Center Long Beach closed on July 3, 2018.

medical groups – MemorialCare Medical Group and Greater Newport Physicians; Seaside Health Plan; and convenient outpatient health centers, imaging centers, surgical centers and dialysis centers throughout Orange and Los Angeles Counties.

An innovator in health care delivery, we focus on evidence-based, best practice medicine. Our physicians and health care professionals study health care’s best practices and work to implement them at all our medical centers. The results are outcomes that frequently exceed state and national averages. For more information on our work and accomplishments please visit <http://www.memorialcare.org/about/reports>.

### **Saddleback Medical Center**

MemorialCare Saddleback Medical Center is a full service, nonprofit hospital in Laguna Hills, California. Saddleback Medical Center provides a wide range of services and innovative specialty programs through its Centers of Excellence which include the MemorialCare Heart & Vascular Institute, the MemorialCare Cancer Institute, the MemorialCare Breast Center, the MemorialCare Joint Replacement Center, Spine Health Center, robotic-assisted surgery program and The Women’s Hospital at MemorialCare Saddleback Medical Center.

Saddleback Medical Center has been named among Orange County Register’s “Best of Orange County” by readers of the Orange County Register, America’s 50 Best Hospitals and Top 50 U.S. Cardiovascular Hospitals. Saddleback Medical Center also received a U.S. News & World Report national ranking of #45 for Best U.S. Orthopedics Hospitals and “high performance” rankings for Heart Bypass Surgery, Heart Failure, Geriatrics, Hip Replacement, Knee Replacement, Gastroenterology & Gastrointestinal Surgery and Urology. The medical center has also achieved Magnet® Designation for Nursing Excellence and the Joint Commission’s Thrombectomy-Capable Stroke Center certification.

### **Governance**

The MemorialCare Saddleback Medical Center Board of Directors guided the direction of community benefit, with assistance from the Community Benefit Oversight Committee (CBOC).

### **Board of Directors**

Barry Arbuckle, PhD

Sharon Cheever

Resa Evans, Chairperson

Thomas Feldmar

James W. Gauss

Catherine Y. Han, MD  
Tim Helgeson  
Julio Ibarra, MD  
Lalita M. Komanapalli, MD  
Joel Lautenschleger  
Donna Rane-Szostak, EdD  
Thomas Rogers  
Lawrence Tran, MD  
Myron Wacholder, MD

### **Community Benefit Oversight Committee**

The CBOC (Community Benefit Oversight Committee) is an advisory committee for the hospital's community benefit programs and reports to the Saddleback Medical Center Quality Council, which is a committee of the Board of Directors. The CBOC reviews and validates legal and regulatory compliance specific to community benefit mandates; assures community benefit programs and services are effectively meeting identified community health needs, with emphasis on populations with unmet health needs; and increases transparency and awareness of community benefit activities. The members of the CBOC include:

- LaVal Brewer, Executive Director, Playworks Southern California
- Susie Caskey, Community Member
- Lauren Gallant, Community Outreach & Government Relations Manager, MemorialCare
- Jan Gameroz, Community Relations Manager, Saddleback Medical Center
- Susan Mcinerney, Laguna Woods Village Social Services Manager
- Donna Rane-Szostak, Saddleback Medical Center Board Member
- Tony Struthers, Vice President, Saddleback Medical Center
- Suzie Swartz, Saddleback Valley Unified School District Board Member
- Elizabeth Tsai, Physician, MemorialCare
- Erin Ulibarri, Policy, Planning and Community Engagement Manager, Orange County Office on Aging

## Our Community

Saddleback Medical Center is located at 24451 Health Center Drive, Laguna Hills, in Orange County, California. The service area is located in Orange County and includes 40 ZIP Codes, representing 17 cities or communities. The hospital service area was determined from the Zip Codes that reflect a majority of patient admissions.

**Saddleback Medical Center Service Area**

| City                   | ZIP Code   |
|------------------------|--|
| Aliso Viejo            | 92656, 92698   |
| Capistrano Beach       | 92624  |
| Dana Point             | 92629  |
| Foothill Ranch         | 92610  |
| Irvine                 | 92602, 92603, 92604, 92606, 92612, 92614, 92616, 92617, 92618, 92619, 92620, 92623, 92650, 92697 |
| Ladera Ranch           | 92694  |
| Laguna Beach           | 92651, 92652   |
| Laguna Hills           | 92653, 92654   |
| Laguna Niguel          | 92677, 92607   |
| Laguna Woods           | 92637  |
| Lake Forest            | 92630  |
| Mission Viejo          | 92690, 92691, 92692  |
| Rancho Santa Margarita | 92688  |
| San Clemente           | 92672, 92673, 92674  |
| San Juan Capistrano    | 92675, 92693   |
| Trabuco Canyon         | 92678, 92679   |
| Tustin                 | 92782  |

The population of the Saddleback Medical Center service area is 919,008. Children and youth make up 20.5% of service area population, 63.6% are adults, and 15.9% are seniors. The service area has a higher percentage of seniors than found in the county (12.5%) and the state (12.3%). More than half of the population (56.7%) is White. At 20.0% of the population, Asians are the second largest race/ethnic group in the service area. Latinos or Hispanics make up 17.1% of the population in the service area. The remaining races/ethnicities comprise 4.7% of the service area population.

Among area residents, 10.6% are at or below 100% of the federal poverty level (FPL) and 18.0% are at 200% of FPL or below (low-income). In the service area, 12.0% of adults are high school graduates, lower than the rate for the county (17.4%) or the state (20.6%). 63.4% of the population in the service area has graduated college, higher than the rate for the county (46.3%) and the state (39.8%).

## **Community Health Needs Assessment**

Saddleback Medical Center completed a Community Health Needs Assessment (CHNA) in 2019 as required by state and federal law. The CHNA is a primary tool used by Saddleback Medical Center to determine its community benefit plan, which outlines how it will give back to the community in the form of health care and other community services to address unmet community health needs. The assessment incorporated components of primary data collection and secondary data analysis that focus on the health and social needs of the service area.

The CHNA examined up-to-date data sources for the service area to present community demographics, social determinates of health, health care access, maternal and infant health, leading causes of death, disability and disease, health behaviors, mental health, substance use and misuse, and preventive practices. When applicable, these data sets were presented in the context of California and compared to the Healthy People 2020 objectives.

Targeted interviews and focus groups were used to gather information and opinions from persons who represent the broad interests of the community served by the hospital. Fourteen (14) interviews were completed from January to March 2019. Interviewees included community stakeholders, public health, and service providers, members of medically underserved, low-income, and minority populations in the community, and individuals or organizations serving or representing the interests of such populations. Two focus groups were conducted in February 2019 that engaged 22 persons. The focus group meetings were hosted by trusted community organizations.

### **Priority Health Needs**

Health needs were identified from secondary data using the size of the problem (relative portion of population afflicted by the problem) and the seriousness of the problem (impact at individual, family, and community levels). The analysis of secondary data yielded a preliminary list of significant health needs, which then informed primary data collection. The primary data collection process was designed to validate secondary data findings, identify additional community issues, solicit information on disparities among subpopulations, ascertain community assets to address needs and discover gaps in resources.

The identified significant health needs were prioritized with input from the community. Focus group attendees and interviewees were asked to rank order the health needs according to highest level of importance in the community. Mental health, access to care, preventive practices, substance use and misuse, and senior health were ranked as the top

five priority needs in the service area. The calculations of the community input resulted in the following priority ordering of the significant health needs:

1. Mental health
2. Access to health care
3. Preventive practices
4. Substance use and misuse
5. Senior health
6. Heart disease/stroke
7. Diabetes
8. Dental care
9. Overweight and obesity
10. Asthma/lung disease
11. Liver disease

The complete CHNA report and the prioritized health needs can be accessed at [www.memorialcare.org/content/community-benefit](http://www.memorialcare.org/content/community-benefit).

## Community Benefit Services Summary FY2019

Community benefit services promote health and healing and are focused on addressing the identified unmet health needs of the community. For a program or service to be considered a community benefit it must: improve access to health care; or enhance the health of the community; or advance medical or health care knowledge; or reduce the burden of government or other nonprofit community efforts.

In FY2019, Saddleback Medical Center provided community benefit activities and programs within its service area that reached over 1,189,000<sup>2</sup> people. A summary of these activities follows.

### Community Health Improvement Services

Activities carried out to improve community health, available to the public, which address a community need.

#### Community Health Education

Health education classes, events, and support groups were made available to the public at no cost. Community health education targeted the community at large, populations with, or at risk of, chronic disease, seniors and populations with health disparities.

Examples of activities included:

- General health and wellness education reached more than 7,800 individuals on topics that included: heart disease, stroke, podiatry, Parkinson's disease, nutrition, heart failure, Alzheimer's disease, spine health, lung disease, joint pain, cardiac rehab, Medicare, and successful aging, among others.
- Senior health fairs reached over 261,000 persons with health information and resources and were held in Laguna Niguel, Lake Forest, Laguna Woods' Wellness in the Woods, Laguna Woods Health and Wellness Expo, North County Senior Summit, and the South County Senior Centers.
- Sessions were presented to over 3,900 persons on preparing for pregnancy, childbirth education, infant safety and CPR, newborn classes and breastfeeding support.
- Balance and conditioning classes assisted 1,700 older adults in learning techniques to help prevent falls and the associated injuries.
- 260 seniors attended exercise and stretching classes.
- Support groups for Parkinson's disease, stroke, cancer, and bereavement reached over 527 community residents and family members/caregivers.
- *CareConnection* quarterly newsletter was made available to service area residents

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<sup>2</sup> Over 874,000 persons were reached through health education messages on public TV, social media, podcasts and the *CareConnection* newsletter.

to provide health education messages and notify the community of free classes, support groups, and screenings offered at the hospital. Nearly 785,000 newsletters were distributed in FY2019. The information was also posted at memorialcare.org.

- 500 individuals listened to podcasts on natural birth, abdominal aortic aneurysm, nutrition, joint pain and hip replacement education.

### Community-Based Clinical Services

- Free cholesterol, stroke and lung screenings were provided to 90 community members and encouraged healthy behaviors, improved preventive practices, and provided early detection of diseases.
- Take Back Medication Program supported the safe collection and disposal of unused medications.

### Health Care Support Services

- Free lactation consultation, open to the community, was provided by registered nurses to 2,734 new mothers using the Lactation Breastfeeding Help Line.
- Patient Financial Services helped 165 individuals enroll in low cost or no cost insurance programs, regardless of where they received care.
- Through the Senior Advocacy program, senior adults received assistance with insurance issues over the phone or in person at the Florence Sylvester Memorial Senior Center and assisted living facilities in the community. Support was given to individuals who need assistance with dual eligibility (Medicare/Medi-Cal).
- Transportation programs for patients and families with limited resources to support access to care. 1,795 persons were supported with needed transportation.
- Through care coordination, Over 1,800 persons received assistance with prescriptions, home health and transportation services.
- MemorialCare hosted the Wellist online platform that connected the public to health information and certified local resources, free-of-charge.

### **Health Professions Education**

Education programs for physicians, medical students, nurses, nursing students, and other health professionals.

### Continuing Medical Education (CME)

CME lectures were offered throughout the year for educational purposes and were available to physicians and health care professionals in the community. Additionally, over 100 nurses and nursing students participated in our Compassionate Listening Program as part of their professional development in FY2019.

Saddleback Medical Center annually funds a University of California, Irvine Medical School gynecological oncology fellowship.

#### Nursing Education

Over 300 nursing students participated in clinical rotations at Saddleback Medical Center from various schools of nursing.

#### Other Health Professions

Saddleback Medical Center welcomed 66 health professionals in fiscal year 2019. Students were educated and performed their clinical hours and/or internship rotations in speech therapy, food and nutrition, physical therapy, physician assistants, lab, pharmacy, cardiac rehab, occupational therapy, respiratory therapy, surgical technicians, echo sonography, imaging, health care administration, and ultrasound therapy.

#### **Cash and In-Kind Contributions**

Funds and in-kind services donated to community groups and nonprofit organizations. The hospital provides in-kind donations of meeting space for a number of nonprofit organizations and community groups. To address food insecurity in the community, Saddleback Medical Center provided food donations to South County Outreach, Mary's Kitchen, and OC Rescue Mission as part of the WasteNotOC initiative.

Additionally, monetary contributions were made to nonprofit organizations that support community benefit efforts and address significant health needs in the community. In FY2019, Saddleback Medical Center supported:

- The Family Assistance Ministries' (FAM) Care Coordination Program. Through this program, FAM provided needed health and social services to individuals and families in South Orange County who are low-income or poverty level, and are homeless or at risk of homelessness. In the first six months of funding, FAM provided necessary support to 4,347 economically vulnerable South Orange County residents who had complex health, behavioral and social needs. FAM utilized their Care Coordination Program to address the underlying causes of each person's instability to help them create a working path toward self-sufficiency or to provide care and comfort during a major illness. Care coordinators incorporated nutritious food options, client cash aid, and housing continuum options. Care coordination ensured each client established a health home.
  - FAM had 4,347 encounters with people accessing food. Clients also had the opportunity to pick up nutritious food educational resources.
  - All clients needing housing stability were provided housing resource assistance including emergency shelter, motel vouchers, rental assistance, rapid rehousing, and permanent supportive housing.

- 212 clients were offered assistance for medication, utilities, and transportation.
- 775 new clients were assisted with financial budgets to coincide with their health needs assessment.
- 2,702 people were provided clothing and personal care items.
- The Illumination Foundation's Bridge2Care Program. The Bridge2Care program helps fill gaps in the continuum of care for homeless Orange County patients in need of housing and services after discharge from the hospital that do not qualify for other programs. The program provided 12 medically-vulnerable homeless adults in South Orange County with 203 extension bed nights. Nurse medical coordinators, case managers, and facility and transportation staff provided wraparound services that included medical and behavioral health monitoring, identification and benefits acquisition, connections to resources, including housing and medical, and transportation facilitation. Our case managers and housing navigators connected 11 (92%) of the B2C clients to housing resources. 5 (45%) of those clients received further housing coordination in supportive bridge housing and 5 (45%) are now living in permanent housing. Only one of the B2C clients who did *not* have insurance on intake. He was enrolled with a medical insurance provider. The others required education about how to utilize their existing insurance and other benefits. Out of the 10 clients who were *not* actively engaged with their primary care provider (PCP), medical specialist, and/or mental health specialist, 9 (90%) received medical coordination, which includes PCP connection, appointment coordination, education about the process, transportation, and attending the appointment with the client if necessary.
- Serving Kids Hope provides nutrition and exercise programming to low-income schools in the Saddleback Unified School District. The focus was primarily on preschool students and their families. This past year, nutritional and exercise classes were provided that reached 32 children at Los Alisos and 10 children at Olivewood. The program staff prepared in-classroom healthy snacks. Parent training sessions were provided for 24 parents, which include cooking demonstrations and practical and positive ways to engage with their children during mealtimes. Program staff conducted 16 group classes with 207 visits for children, providing exercise and nutrition classes. The program partnered with produce companies to provide free boxes of fruits and vegetables to families in the lowest income schools within the Saddleback Unified School District as part of our program.
- Age-Well Services – Transportation Program. The Non-Emergency Transportation Program served seniors throughout South Orange County. The program provided safe, affordable, and reliable transportation that enhances the quality of life for seniors by helping them access health care services and remain socially active.

The Non-Emergency Medical Transportation Program serves adults 60 years-of-age or older who live within Age Well's 400 square mile South Orange County service area. Many participants are frail, homebound, low-income, isolated elderly. A high proportion of clients are over 85 and need extra help getting from door to curb.

- Elderly and disabled Non-Emergency Transportation Program participants took more than 23,000 trips.
- Frail elderly with chronic conditions took more than 16,349 trips to doctors, dialysis, physical therapies, etc. through the non-emergency transportation program.
- 80 older adults used daily group door-to-door transportation to local senior centers and adult day services where they enjoyed a nutritious lunch and social activities.
- Be Well OC brings together a robust, community-based, cross-sector strategy to create a community-wide, coordinated ecosystem to support optimal mental health. MemorialCare supported this initiative through a cash donation and staff in-kind support.

### **Community Building Activities**

Activities that support community assets by offering the expertise and resources of the hospital organization. These activities may address the root causes of health problems or the determinants of health, such as education, homelessness, poverty and environmental concerns.

#### Coalition Building and Advocacy

Hospital representatives serve on a number of local, regional and state level organizations and committees that address health improvement. MemorialCare engages in local, state and national advocacy efforts that support access to health care.

#### Workforce Development

Saddleback Medical Center participated in community programs that encouraged careers in the health professions. To instill interest in the medical field with local students, Saddleback Medical Center also provided a blood donor center and lab tour for 36 students.

## Financial Summary of Community Benefit

Consolidated financials for MemorialCare Health System hospitals: Saddleback Medical Center, Orange Coast Medical Center, Long Beach Medical Center, and Miller Children's & Women's Hospital Long Beach

| Community Benefit Categories   | Net Benefit (in thousands of dollars) |
|--|---------------------------------------|
| CHARITY CARE <sup>1</sup>  | \$9,624                               |
| UNPAID COSTS OF MEDI-CAL <sup>2</sup>                                      | \$19,335                              |
| OTHERS FOR THE ECONOMICALLY DISADVANTAGED <sup>3</sup>                     | \$507                                 |
| EDUCATION AND RESEARCH <sup>4</sup>  | \$18,154                              |
| OTHER FOR THE BROADER COMMUNITY <sup>5</sup>                               | \$9,739                               |
| <b>TOTAL COMMUNITY BENEFIT PROVIDED EXCLUDING UNPAID COSTS OF MEDICARE</b> | <b>\$57,359</b>                       |
| UNPAID COSTS OF MEDICARE <sup>2</sup>                                      | \$68,798                              |
| <b>TOTAL QUANTIFIABLE COMMUNITY BENEFIT</b>                                | <b>\$126,157</b>                      |

<sup>1</sup> Charity Care includes traditional charity care write-offs to eligible patients at reduced or no cost based on the individual patient's financial situation.

<sup>2</sup> Unpaid costs of public programs include the difference between costs to provide a service and the rate at which the hospital is reimbursed. Estimated costs are based on the overall hospital cost to charge ratio. This total includes the Quality Assurance Fees paid to the State of California.

<sup>3</sup> Includes other payors for which the hospital receives little or no reimbursement (County indigent).

<sup>4</sup> Costs related to the medical education programs and medical research that the hospital sponsors.

<sup>5</sup> Includes non-billed programs such as community health education, screenings, support groups, clinics and support services.

## **Community Benefit Plan FY2020**

In FY2019, Saddleback Medical Center conducted a CHNA to assess the significant health needs for the hospital area. Priority health needs were identified that the hospital has chosen to address through its Implementation Strategy. For Saddleback Medical Center, selected community benefit efforts shall focus on increasing and supporting access to health care services through direct programs and partnerships with local community-based organizations. Our programs address the following priority health needs:

- Access to care
- Chronic diseases
- Mental health and behavioral health (substance use)

All community benefit efforts shall have a special focus on the senior population.

### Addressing Health Needs

The Implementation Strategy, developed from the FY2019 CHNA, spans the period of 2020-2022. Saddleback Medical Center will meet the identified priority health needs through a commitment of resources with the following programs and services:

### **Access to Care/Preventive Care**

Saddleback will address access to care by taking the following actions:

- Provide financial assistance through both free and discounted care for health care services, consistent with the hospital's financial assistance policy.
- Provide transportation support to increase access to health care services.
- Provide grant funding and in-kind support to community organizations to support access to health care and preventive care.

### **Chronic Diseases (Alzheimer's Disease, Cancer, Diabetes, Heart Disease, Liver Disease, Lung Disease, and Stroke)**

Saddleback will address these chronic diseases by taking the following actions:

- Offer community health education, community lectures, presentations and workshops.
- Host health and wellness fairs for seniors, including screenings.
- Offer flu shot clinics.
- Provide support groups to assist those with chronic diseases and their families.
- Provide public health education in the media and community health awareness events to encourage healthy behaviors and prevent chronic diseases.
- Provide grant funding and in-kind support to community organizations to support chronic disease prevention and treatment.

## **Mental Health and Behavioral Health**

Saddleback will address mental health and behavioral health by taking the following actions:

- Offer community health education, community lectures, presentations and workshops.
- Participate in health and wellness fairs that include screenings for anxiety and depression.
- Support multisector collaborative efforts that support access to mental and behavioral health services.
- Increase community awareness of prevention efforts and availability of resources to address mental and behavioral health concerns.
- Provide grant funding and in-kind support to community organizations to support mental and behavioral health awareness and access to care.

## **Evaluation of Impact**

Saddleback Medical Center will monitor and evaluate the programs and activities outlined above. The hospital anticipates the actions taken to address significant health needs will improve health knowledge, behaviors, and status, increase access to care, and help support good health. The hospital is committed to monitoring key initiatives to assess impact and has implemented a system to track the implementation of the activities and documents the anticipated impact. Our reporting process includes the collection and documentation of tracking measures, such as the number of people reached/served, increases in knowledge or changes in behavior as a result of planned strategies, and collaborative efforts to address health needs. Through our grants program, community partners track and report program outcomes. An evaluation of the impact of the hospital's actions to address these significant health needs will be reported in the next scheduled CHNA.

## **Contact Information**

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### Web Address

<https://www.memorialcare.org/saddleback-medical-center>

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