



CASA *D*DORINDA

# Philanthropy at Casa Impact Report

*Spring 2023*

# HISTORY OF PHILANTHROPY AT CASA DORINDA

## 1995

### MEDICAL CENTER



Fundraising campaign launched by residents - \$9 million raised

## 2014

### ENDOWMENT FUND

Established through a matching gift resident led campaign



## 2019

### EMPLOYEE EMERGENCY FUND

Created and funded by residents



## 1988

### BENEVOLENT CARE FUND



Established with a gift of \$40,000

## 1997

### SCHOLARSHIP FUND



Established and funded by residents

## 2016

### LEGACY CAMPAIGN

Launched for the Personal & Memory Care Center - \$9.5 million raised



## 2020



Casa Dorinda's Planned Giving program established

## TODAY

As a not-for-profit retirement community, we greatly appreciate the gifts we receive from residents and their families, MRA Board members, business partners and our staff.

Your generous donations further our philanthropic mission, enhance the lives of our residents, improve our campus, strengthen our financial position, and support our dedicated staff.



# CASA DORINDA'S PHILANTHROPY PROGRAM

A recent collaborative effort between resident leaders, the MRA Board, and key staff led to the development of a simplified giving program at Casa Dorinda.

- A Philanthropy Impact Report is produced semi-annually to give you an opportunity to review our philanthropic activities and reflect upon those programs you might wish to support.
- A remittance envelope is included within the report in case you wish to make a tax-deductible donation to one or more funds.
- You have the convenience of writing one check (or having your donation added to your monthly statement).

**Special Note:** Because gifts to the Employee Appreciation Fund are not tax-deductible, solicitation for this fund will continue to be a separate campaign held in the fall of each year.



## REPORT OVERVIEW

In this report, we will feature Casa's various funds and programs, share how your donations make an impact, highlight a "Casa Cares" story and invite you to invest in our mission.

### CASA FUNDS

Benevolent Care Fund  
Where the Need is Greatest  
Community Enhancement Fund  
Endowment Fund

### EMPLOYEE SUPPORT FUNDS

Employee Emergency Fund  
Scholarship Fund

### PLANNED GIVING

Sequoia Society



## MRA PHILANTHROPY COMMITTEE



MRA Philanthropy Committee: Diana Lovan\*, Nancy Spivey, Lisa Thomas, Brian McCague\*, Vicki Hazard\*, Kate Feldstein, Janet Debard, Suzi Schomer, Arnie Bellowe, Matt Brown\*, Paul Jepson M.D.

\*MRA Board Member

### The MRA Philanthropy Committee is committed to:

- Mindfully coordinating all of Casa's philanthropic activities on campus
- Fostering philanthropic opportunities that are meaningful to the Casa community
- Recognizing annual participation in our philanthropic program
- Celebrating stories of giving that impact the lives of Casa's residents and employees
- Continually stewarding the generosity of the Casa donor family



## FUNDS THAT SUPPORT CASA DORINDA TODAY

### Resident Benevolent Care Fund

Established in 1988, this fund helps Casa residents who have outlived their financial resources and ensures they will always have a home at Casa. Over the years, donors have contributed more than \$1.7 million to this program.



*“We are surrounded with the warmth and caring of everybody at Casa Dorinda - it is truly the place we all call home and that is why we contribute to the Benevolent Care Fund to ensure that nobody is denied that security and can continue to live and thrive here.”*

*—Michael & Ruth Deeley*

*Average number of residents who receive supplemental support: 4 per year*

*Average dollars spent each year: \$90,000*

*Fund Balance: \$770,000*

*Funds Contributed Current Year: \$25,100/ 2 Gifts*

*Funds Contributed Prior Year: \$3,750/ 3 Gifts*



### Where the Need is Greatest/Unrestricted Gifts

Unrestricted gifts are extremely valuable to Casa Dorinda. They make an immediate impact upon our current financial position, show support of Casa's overall mission, and demonstrate trust that the gift will be responsibly utilized and directed where the need is greatest.

*Funds Contributed Current Year: \$14,444/ 9 Gifts*

*Funds Contributed Prior Year: \$171,520/ 33 Gifts*



## FUNDS THAT SUPPORT CASA DORINDA TODAY

### Community Enhancement Fund – Special Purpose Gifts

Casa receives donations for special purposes throughout the year. A resident may have an experience that ties them closely to a specific department on campus, so they choose to invest in that department or area. Casa Dorinda now has its own putting green thanks to a generous gift to the Community Enhancement Fund from Dr. Albert and Toni Amorteguy.

*“I thought that re-installing a putting green would benefit many of our residents. I requested that Brian guide me through the process of obtaining approval from the necessary committees. Toni and I felt that providing the funding would expedite the process. After the approval was obtained from the various levels of governance, we were able to complete the process in five days from start to finish. Being the present Chair of the Employee Emergency Fund here at Casa, and having had an independent Medical practice, I am very familiar with the emergent needs of employees as well as patients and therefore I have requested that those interested in supporting this project, please contribute to our EEF.”*

—Dr. Albert Amorteguy



**Funds Contributed Current Year: \$47,200/ 4 Gifts**  
**Funds Contributed Prior Year: \$208,804/ 28 Gifts**





# SUPPORTING CASA DORINDA'S FUTURE

## Casa Dorinda Endowment Fund

PHILANTHROPY AT CASA



WHAT WE DO FOR OTHERS LIVES ON



*“When we learned about Casa’s Endowment we knew it was something we wanted to support. We would like to see it grow so that it can be called upon for a special project that would benefit the campus and our community.” Doris commented, “As Resident Council President last year, I formed a great appreciation for Casa...how it is managed and its mission of caring for older people as they age with dignity. We are pleased to be annual contributors to Casa Dorinda, especially to the funds that support Casa staff.”*

*—Robert & Doris Schaffer*

**Fund Balance: \$631,805**

**Funds Contributed Current Year: \$206,000/ 1 Gift (Bequest)**

**Funds Contributed Prior Year: \$43,637/ 11 Gifts**

- Donations to the endowment are invested for the long-term strength of Casa Dorinda.
- Your original gift remains untouched in perpetuity and the earnings will be available for supporting extraordinary projects approved by the MRA Board that would significantly enrich the lives of current and/or future Casa residents.
- Once the fund reaches \$1 million, a committee will be formed to help determine how future earning will best be utilized.

*We are grateful for the significant estate gift we received this year, which brings us closer to the \$1 million mark!*





# Q&A WITH RESIDENT SUZI SCHOMER

## **How would you describe the Sequoia Society?**

Sequoia Society recognizes those who wish to provide for the long-term success of Casa through their estate plans or other planned gifts. It is not another fund, but rather a conduit to make a future gift to the fund of your choice.

## **What are the simplest ways to join the Sequoia Society?**

Name Casa as a beneficiary under an IRA, a Life Insurance Policy, or a Donor Advised Fund (no out-of-pocket expenditures). Or, make a future commitment in your living trust of a specific amount or percent that would go to Casa Dorinda after your lifetime.

## **What do you find rewarding about being a Sequoia Society member?**

I like being a member of a group of people who are interested in the long-term sustainability of Casa Dorinda.

## **Why do you serve on the Sequoia Committee?**

It provides an opportunity to use some of my experience in assisting people with their estate and charitable planning for the benefit of Casa.

**Current # of Members: 108**

**Bequests/Planned Gifts received since Sequoia Society was established: \$706,000**

**Estimate of Future Gifts Casa will receive: \$6,821,338**





— 3RD ANNUAL SEQUOIA SOCIETY TREE CELEBRATION —



To learn more about how to join, please contact a Sequoia Society Committee member:  
Lisa Thomas, Edie Dinneen, Barbara Hadley, Suzi Schomer, Missy DeYoung, Bill Kimsey & Peter Beuret



# — FUNDS THAT SUPPORT CASA DORINDA EMPLOYEES —

## Employee Emergency Fund

*“I am a cancer survivor. The Employee Emergency Fund helped relieve financial stress during my recovery. I was able to come back to work slowly after I made it through my treatments. The EEF also provided assistance when my mother died. A caring resident noticed I was working all the time to save up for a plane ticket and he encouraged me to apply for this benefit. I was able to get home to my family. The EEF has come to my rescue twice and the same with other Casa employees. I’ve worked at other places and it is not the same feeling...here it is like a family and it’s a very special place to work.”*

—Noeme Bautista



### Fund Status & Impact

**Grants Awarded Current Year: 13 totaling \$29,700**

**Grants Awarded Prior Year: 52 totaling \$124,866**

**Fund Balance: \$206,704**

**Funds Contributed Current Year: \$135,412/ 17 Gifts**

**Funds Contributed Prior Year: \$104,919/ 71 Gifts**









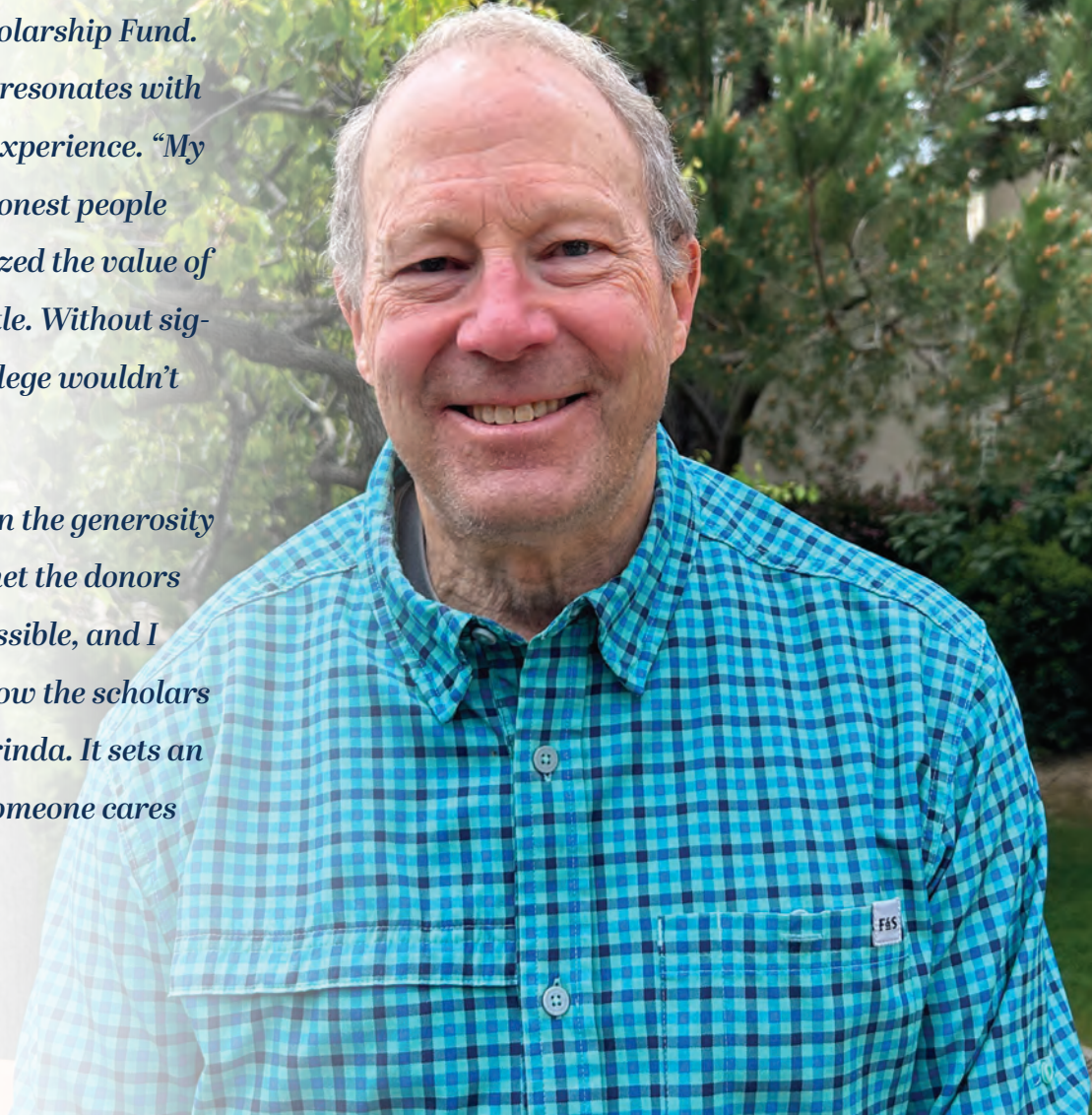
# — FUNDS THAT SUPPORT CASA DORINDA EMPLOYEES —

## Casa Scholarship Fund

*“Casa resident, Steve Johnson, helps residents repair clocks, small furniture items, and more. As an engineer, Steve likes using his hands and helping his neighbors. While many residents offer to pay him, he instead encourages donations to our Scholarship Fund. Actively supporting education resonates with Steve because of his personal experience. “My parents were hard-working, honest people with limited means. They realized the value of education since they had so little. Without significant scholarship funds, college wouldn’t have been attainable.”*

*“I’m pleased to be able to return the generosity that changed my life. I never met the donors who made my scholarships possible, and I like that we get to meet and know the scholars we’re helping here at Casa Dorinda. It sets an example to the students that someone cares enough to lend them a hand.”*

—Steve Johnson



**Scholarships Awarded Current Year: 22 totaling \$90,000**

**Scholarships Awarded Prior Year: 19 totaling \$77,500**

**Average Scholarship: \$4,000**

**Funds Contributed Current Year: \$68,570/ 20 Gifts**

**Funds Contributed Prior Year: \$146,440/ 99 Gifts**

**Fund Balance: \$175,666**

**Casa Scholarship Fund Endowment Balance: \$600,377**





## A CASA DORINDA “RISING STAR”

### 20 Years and Counting



*“I have received scholarships for five years which has helped me advance my career in nursing. My career began at Casa as a CNA and I am now an RN and Director of Staff Development and Assistant Director of Nursing. I am currently pursuing my Bachelor of Science degree in nursing at Western Governors University.*

*I also received a grant from the Employee Emergency Fund to help me with burial costs for my mother who passed away suddenly in Turkey. It made such a difference and I felt supported and cared for during a difficult time. I would not be here today without the continued support from the Casa family, and I am forever grateful.”*

—Aneta Stoyanova

**Over the years, this fund has awarded 754 scholarships, totaling \$1,735,000!**

**To donate to the Casa Scholarship Fund, please use the enclosed envelope.  
We do not have a separate campaign for the Scholarship Fund.**

### Employee Appreciation Fund

This is a fund that supports more than 250 staff with a year-end holiday gift. Thank you to all our residents who contributed to the fund in 2022! Our entire staff is very grateful.

*“The Employee Appreciation Fund provided the funds to purchase my first professional camera. I now have my own photography business and teach this art to the youth. Thank you, Casa residents, for opening my eyes to the world through photography.”*

—Adrian Sanchez,  
Program Leader – Medical Center,  
Life Enrichment







Katina Zaninovich, Jane Seymour, Lindsey Leonard (*Executive Director*)

Casa Dorinda has been a proud supporter of the Alzheimer's Association for seven years. Members of our Leadership Team attended the Inspire Luncheon - Your Brain Matters on April 26th. Actress Jane Seymour was a keynote speaker and Andrew Firestone was the Master of Ceremonies. Our MRA board member, Katina Zaninovich, is the Board Chair and Luncheon Event Chair for the Alzheimer's Association. It was a wonderful event that brought us up to date on the latest medical advancements, honored caregivers, and educated attendees about how the Association is helping those struggling with the disease.

The Casa Team looks forward to participating in the Alzheimer's Walk each year. Residents and team members walk to raise awareness and funds to end Alzheimer's Disease and other dementias. As part of our Community Engagement efforts, Casa is honored to support organizations whose work makes a positive difference in the lives of residents and community members.







# CASA DORINDA

We hope you have enjoyed reading our Spring Philanthropy Impact Report. Every gift we receive supports our overall mission, directly benefits our present and future residents, and supports our treasured staff members.

If you haven't joined the Casa donor family, we invite you to become an annual contributor by making a gift to the fund(s) most meaningful to you. Our simplified giving process allows you to make one donation which can be directed to more than one fund.

Three easy ways to make an annual gift to Casa Dorinda:

1. **Monthly statement:** add your donation to your Casa monthly statement (see enclosed envelope)
2. **IRA:** make a qualified charitable donation through your IRA (contact your IRA custodian)
3. **Donor Advised Fund:** request a grant to the Montecito Retirement Association through your DAF

Please see the enclosed envelope for more information on making a tax-deductible donation or contact Lisa Thomas, Director of Philanthropy at 805.969.8070 or [lthomas@casadorinda.org](mailto:lthomas@casadorinda.org).

*We are grateful for your support!*



CASA DORINDA

*California's Premier LifeCare Community*

805 969 8011 | [www.casadorinda.org](http://www.casadorinda.org)

Casa Dorinda is a private LifeCare CCRC Community, owned and operated by the Montecito Retirement Association, a nonsectarian, nonprofit, tax-exempt organization. State of California Licenses RCFE #421700160, SNF #050000112, CCRC Certificate of Authority #126.