



CASA *D*DORINDA

# Philanthropy at Casa Impact Report

*Winter 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

**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



**2019**  
**EMPLOYEE EMERGENCY FUND**

Created and funded by residents



**2020**



Casa Dorinda's Planned Giving program established  
- 113 members

**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.

# PHILANTHROPY AT CASA



WHAT WE DO FOR OTHERS LIVES ON

Paul and Pamela Jepson's longstanding support for Casa Dorinda began in 2014, when our Endowment Fund was created and our philanthropy program was in the early stages of development. Their continued support over the years speaks volumes about their commitment to Casa Dorinda's mission.

*“Pam’s positive experience while in the Medical Center deepened our commitment to having Casa as our home and we wanted to express our gratitude in a meaningful way. After becoming aware of the need, investing in an improved Electronic Medical Record system aligned well with our passion for medical care. We are pleased to contribute to this technological advancement so as to improve efficiency and enhance satisfaction for our physicians, medical staff, and fellow residents.”*

—Paul & Pamela Jepson



*“We appreciate the Jepsens’ generosity and their active engagement in the process as we move this meaningful initiative forward.”*

—Therese Brown, Senior Director of Health Services

## PHILANTHROPIC INITIATIVES THAT SUPPORT 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

## — COMMUNITY ENHANCEMENT FUND HIGHLIGHTS —

### NEW PROJECTOR AND SCREEN

*“Our involvement and passion for the Nelson Howard Lecture Series raised our awareness that a new projector and screen would benefit many programs and activities and promote a sense of community. Investing in this new equipment for all to enjoy is something we are proud to support and we’ve been touched by the appreciation we’ve received.”*

*—Dennis Klos and Dr. Sarah Fox*



### NEW KILN FOR CERAMICS



*“The life enrichment program encourages people to explore their artistic interests and blossom. The enjoyment of sharing and creating art together has spurred my creativity. When I learned the ceramics studio needed a new kiln it seemed natural to contribute as a way to give back. Giving to anything here at Casa reaps rewards because we all benefit and it strengthens our community. It’s a no-brainer!”*

*—Mark Bennett*

Funds Contributed 2023: \$84,000/ 14 Gifts  
Funds Contributed 2022: \$209,000/ 28 Gifts

# PROJECTS FUNDED THROUGH PHILANTHROPY

- Electronic Medical Records
- Projector and Screen for Auditorium
- Games and Crafts for Memory Care Program
- Live Music in the Grill
- Enhanced Hearing Technology Headsets
- Music and Memory Supplies
- Video Camera
- CPR Training Supplies
- Putting Green
- Wheel Chairs
- Virtual Dementia Tour Program
- Dementia Training for Staff



*Konrad Kono, Pianist*

## WHERE THE NEED IS GREATEST/ UNRESTRICTED GIFTS

Your gift makes an immediate impact upon our current financial position and shows support of our mission.

**Funds Contributed 2023:**  
\$49,000/ 30 Gifts

**Funds Contributed 2022:**  
\$ 172,000/ 33 Gifts



## BENEVOLENT CARE FUND

Residents who outlive their financial resources will always have a home at Casa Dorinda.

- Average number of residents who receive supplemental support: **4 per year**
- Average dollars spent each year: **\$90,000**

**Funds Contributed 2023:**  
\$28,000/ 5 Gifts

**Funds Contributed 2022:**  
\$3,800/ 3 Gifts

**BENEVOLENT CARE FUND BALANCE: \$775,000**

## SEQUOIA SOCIETY - PLANNED GIVING

- The Sequoia Society is a giving vehicle which gives you the option of directing your future gift where the need is greatest or to the specific fund that is most meaningful to you.
- More than 100 Casa residents have joined our Sequoia Society by making arrangements to leave a future gift to Casa Dorinda through their will or estate plan.
- There are easy ways to designate your future gift without having to re-do your estate plan, such as beneficiary designations through your *IRA, Donor Advised Fund, or Life Insurance Policy.*

# Sequoia Society

ANNUAL DINNER

*Our 2nd Annual Sequoia Society dinner honored and celebrated our current and past Sequoia Society members.*



Planned Gifts received since Sequoia Society was established: \$685,000  
Estimate of Future Gifts Casa will receive: \$7,121,000

# THANK YOU TO OUR SEQUOIA SOCIETY MEMBERS

Dr. & Mrs. A.E. Amorteguy

Doris M. Amory\*

Jean Archer

Norm & Joan Armour

Penny Arntz

Randy Bassett

Ruth M. Beach\*

Jill & Arnold Bellowe

Linda & Peter Beuret\*

Sherry Bevan\*

Virginia Castagnola-Hunter\*

Mary Carolyn &  
Stebbins Chandor, MD\*

Drs. Sue & JW Colin\*

Janet & Roger DeBard\*

Ruth & Michael Deeley\*

Kristin Demong & Charles Atkins\*

Marilyn Brant Chandler DeYoung\*

Edith N. Dinneen\*

Ann Edmonston\*

Kathleen Feldstein

Kate & Brooks Firestone

Phyllis & David Grey\*

Carolyn Groth-Marnat\*

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Drs. Eva & Yoel Haller\*

Carole & Steve Halsted

Burks L. Hamner

Vicki & Bob Hazard\*

Diane & Ray Hester

Jackie Inskip

Gina Jannotta

Pamela & Paul Jepson, MD\*

Donna Kelsey\*

Jane & Tom Kern\*

Nancy & William Kimsey\*

June & William Kistler\*

Anna K. Kuhn

The Kupperman Families

Kathryn F. Lacey

Myra Thomas Lawrence\*

Shirley & Seymour Lehrer\*

Lucille Mayer & Nico March\*

Dona & George McCauley

Gisèle & Brian McDermott\*

Marie L. Morrisroe

Bobbe & Ed Mullen

Joanie Myers\*

Susan & Terry Northrop, MD\*

John E. Parkerson

Jack Perrin\*

Margaret & Fred Perutz\*

Julia & Arthur Pizzinat\*

Joanne & Brian Rapp

Jean Rogers

Wendy Ross

Robert & Doris Schaffer

Maryan Schall\*

Nancy B. Schlosser\*

Suzi Schomer\*

Nina R. Schooler

Kay & Ted Stern

Sunni & Ray Thomas\*

Cynthia & Ted Thoreson, MD\*

Sherry & Jim Tilton\*

Martha Tolles\*

Victoria Thompson Treece\*

Deanne G. Violich

Kathryn Washburn

Donna Weinstein

Candace Collons White\*

Janet & David Williams, MD\*

Maureen & David Williams\*

Nancy & Bryron Kent Wood

Virginia & William Woolley\*

Robert H. Yamin\*

Francine & Bill Zieverink

\*Founding Member



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

## CASA DORINDA ENDOWMENT FUND

- 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 earnings will best be utilized.

*“Casa has been very good to me, and my children and grandchildren love visiting. I support Casa’s Endowment Fund to ensure that future generations will be able to experience our special community for many years to come.”*

*—Beth Leddy*



Funds Contributed 2023: \$236,000/ 5 Gifts  
Funds Contributed 2022: \$44,000/ 11 Gifts  
FUND BALANCE: \$650,000





# SUPPORTING CASA DORINDA EMPLOYEES

*“The Casa Scholarship Fund is important to me because I believe in empowering our staff and their families to achieve their educational goals.”*

—Janet DeBard,  
Scholarship Fund Chair



*Hector Aldapa Morales is a 2023 Scholarship Awardee studying Business Administration at UC Irvine.*

## SCHOLARSHIP IMPACT

- 2023: 22 awards totaling \$90,000
- 2022: 19 awards totaling \$77,500

## AVERAGE GRANT AMOUNTS

- \$5,000 – Four Year College
- \$2,500 – Junior College or Vocational School

**Funds Contributed 2023:**  
\$105,000/ 47 Gifts

**Funds Contributed 2022:**  
\$146,000/ 99 Gifts

**Current Fund Balance:**  
\$217,000

**CASA SCHOLARSHIP FUND ENDOWMENT BALANCE: \$600,400**

## EMPLOYEE APPRECIATION FUND

This is a fund that supports more than 300 staff with a year-end holiday gift. Thank you to all our residents who contributed to the fund in 2023! It was a banner year and our staff are beyond grateful.





*“Dear Residents,  
Thank you for covering the funeral expenses for my daughter Adriana Mejia. I am grateful for the Employee Emergency Fund and Casa Dorinda for helping me and my family find some relief during a very difficult time. I hope that you can continue to help and support team members from Casa Dorinda when they have an emergency like I did. I will forever be grateful. Blessings to you all.”*

—Maria Elena Mejia



Katina Zaninovich is a member of the MRA Board and serves on the EEF Application Review Committee.

*“The EEF is my favorite committee to serve on because the results are immediate. It is so wonderful to know what a difference this really makes in our employees’ lives. It is one of the best things about Casa...the loyalty and service of our employees and the care and support of staff and residents. No wonder everyone wants to live here!”*

—Katina Zaninovich

## EMPLOYEE EMERGENCY FUND GRANTS

- 2023: 25 grants totaling \$59,000
- 2022: 52 grants totaling \$125,000

**Funds Contributed 2023:**  
\$158,000/ 48 Gifts

**Funds Contributed 2022:**  
\$105,000/ 71 Gifts

EMPLOYEE EMERGENCY FUND BALANCE: \$191,000

# THANK YOU TO ALL OUR 2022-2023 DONORS

Dr. A.E. & Toni Amorteguy

Doris Amory

Anonymous (3)

Jean Archer

Norman & Joan Armour\*

Chuck Atkins & Kristin Demong

Richard & Sally Barden

Peter & Robin Barker

Sally Beckham

Nancy Beckstrom

John & Nan Bedford

Arnold & Jill Bellowe

Peter & Linda Beuret

Paul Blake & Mark Bennett

Alan Blaver

Sally Boughton

Matthew Brown

David A. Brown

Mary "Therese" Brown

Glynn Caberte

Michael Cameron\*

Claude & Susan Case

Harold & Jody Cassriel

Jacqueline Castaneda

Dr. Angela Chesser

Dr. Ramona & Guy Clark

Julia Collins

Geraldine Cramblit

Roger & Joan Craton

Serena Crowley

Larry Dam & Betsy Jones

Roger & Janet DeBard

Michael & Ruth Deeley

Holly Deweese

Missy DeYoung

Edith Dinneen

Diskant Family Foundation

Dr. Roger & Keiko Dunham

Betsy Edwards

Kate Feldstein

Robert Flink\*

Robert & Patsy Fulmer

Betty Fussell

Wes & Mary Jo Gibson

Peter & Betty Gray

Carolyn Groth-Marnat

Richard & Mimi Gunner

Cissy Hadley

Marian Hall

Drs. Yoel & Eva Haller

Burks Hamner

Madeline Hanrahan

Ruthmarie (Hoppie) Harpham\*

Dr. Richard & Renee Hawley\*

Bob & Vicki Hazard

Diane Hester

Stephen & Patricia Hicks

Robin & Josephine Hodge

Bradley Hollister

Stewart Hudnut

Barbara Hume

Jackie Inskeep

Ann Jackson Family Foundation

Mary Jarchow

Dr. Paul & Pamela Jepson

Michelle Joanou

Steven & Suzane Johnson

William Johnston  
& Dr. Maryann Beck

Katherine L. Olson  
Charitable Foundation

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Richard & Connie Kennelly

William & Nancy Kimsey

Carolyn Kincaid (Henderson)

Dennis Klos & Dr. Sarah Fox

Thomas & Travis Kranz

Anna Kuhn

Cal & Kathryn Lacey

Myra Lawrence\*

Elizabeth (Beth) Leddy

Seymour & Shirley Lehrer

Larry Liddle

Dr. Fima & Jere Lifshitz

Richard & Marlene Lloyds

Diana Lovan

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Paul P. Polsky

Patty A. Polsky

Robert & Joan Pratt

Martha Purl

Jane Quinn

Jane Radin (Eagleton)

Nikki & Alex Ramirez

Wendy Ross

Shirley Ross

Elisabeth Ryden  
Robert & Doris Schaffer  
Maryan Schall  
Nancy Schlosser  
Joan Schneider\*  
Katherine Suzanne Schomer  
Nina Schooler  
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Jean Von Wittenburg  
Kathryn Washburn  
Drs. Alex Weinstein  
& Betty Helton  
Charles Weis  
Candace White  
Dr. David L. & Janet Williams  
William & Virginia "Gini" Woolley\*  
David Yager  
Wendy Yager  
Katina Zaninovich  
Elsbeth (Gina) Ziegler  
Marie Zondler

**2023 TRIBUTE RECOGNITION  
IN HONOR OF**

Albert Amorteguy, MD  
Penny Arntz  
Bob & Pat Fulmer  
Betty Fussell  
Suzanne Johnson

Steve Johnson  
Medical Center Staff  
Romma Murphy (Clinic)  
Rigo Perez (Med Center)  
Physical Therapy Staff  
Maria Robles (Clinic)  
Nancy Schlosser  
Candace Vera

**IN MEMORY OF**

Sherry Bevan  
Diana Brown  
Michael Cameron  
Eileen Carpenter  
Barbie Henzell  
Ray Hester  
Irene Hymanson  
Myra Lawrence  
Nico March  
Claire Parent  
Fred Perutz  
Richard Schall  
Lynn Shafer  
Patricia Van Every

*If there are any errors or omissions please accept our apologies and contact Lisa Thomas (805) 969-8070, lthomas@casadorinda.org.*

*Recognition list includes the names of donors that gave to any of Casa Dorinda's charitable (tax-deductible) funds in 2022-2023.*

*\*Deceased*

***"It feels wonderful to give to Casa Dorinda and witness the results of making a positive impact."***

***—Lou Mayer***





## CASA'S NEW CNA PROGRAM

Our new Certified Nursing Assistant (CNA) training program is a collaboration between our funder the GatewayIn Project, curriculum provider LA Skills Academy, and Casa Dorinda which serves as the clinical training site. Theresa Brown, Senior Director of Health Services, pursued this collaboration to meet our communities' need for CNAs. Our 2023 students are pictured here.



**CASA STAFF AND RESIDENTS HAVING FUN  
AND RAISING AWARENESS FOR  
THE ALZHEIMER'S ASSOCIATION!**





# CASA DORINDA

## YOUR GIFTS FURTHER OUR PHILANTHROPIC MISSION

- Enhance the Lives of Casa Residents
- Support and Lift Up our Employees
- Improve our Programs and Campus
- Bolster our Financial Strength

## JOIN US

We invite you to become a loyal donor by making an annual 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)

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