



CASA DORINDA

Philanthropy at Casa

Spring Update 2025

HISTORY OF PHILANTHROPY AT CASA DORINDA



1995 MEDICAL CENTER

Fundraising campaign
launched by residents
- \$9 million raised

2014

CASA 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
Giving program
established
- 135 members

FOR GENERATIONS, A LEGACY OF GIVING
HAS SHAPED CASA DORINDA'S STORY.

Cover photo:

Casa resident Penny Arntz and dance instructor Felipe Castaneda practiced their moves before our Bubbles and Blossoms Ball. Donations from the Billy Taverner Music & Dance Memorial and The Kirby-Jones Foundation provided dance classes and many more life enrichment activities throughout the year.

PHILANTHROPY AT CASA



WHAT WE DO FOR OTHERS LIVES ON

Dear Friends,

Our Spring Philanthropy Report offers an inspiring glimpse into how charitable giving enriches life at Casa Dorinda. Inside, you will find updates on our program, stories of giving and gratitude, and opportunities to explore your interests in supporting our mission.

We are immensely grateful for the generosity of our residents and other stakeholders. Unlike our for-profit counterparts, every dollar we receive is reinvested in our Casa community. Philanthropy continues to make a meaningful difference for our Casa Dorinda family and campus through these charitable initiatives:

CASA FUNDS

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

EMPLOYEE SUPPORT FUNDS

Employee Emergency Fund
Scholarship Annual & Endowment Fund

PLANNED GIVING

Sequoia Society



Residents showcased the moves they've been learning in our dance classes at our Blossoms & Bubbles Dance.

— COMMUNITY ENHANCEMENT FUND HIGHLIGHTS —

Thanks to generous contributions to our Community Enhancement Fund, we're able to expand services, invest in staff training, launch new programs, and acquire essential equipment—all beyond the limits of our standard budget.

“The Medical Center staff were like family during our unexpected two-month stay. Every staff member was kind, empathetic, and attentive, which made such a difference during a challenging time. We decided to make a gift to the Medical Center that would support the staff, as they had done so much for us. Directing our gift to a new Wellness Room to uplift and rejuvenate them seemed like the perfect idea.”

—Linda and John Seiter



Funds Contributed YTD 2025: \$19,800/ 10 Gifts
Funds Contributed 2024: \$204,400/ 51 Gifts

PROJECTS FUNDED THROUGH PHILANTHROPY

- Dance Classes/Musical Performances
- Electronic Medical Records Upgrades
- Employee Wellness Room in the Medical Center
- Fitness Equipment
- Furnishings for Medical Center Observation Rooms
- Housekeeping Renovations
- Medical Center Shower Room Upgrades
- Memory Care Programming
- New Wheelchairs
- Outdoor Patio Furniture for Medical Center
- Oxygen Concentrators
- Vital Signs Machine
- Staff Training for Two Phlebotomists
- Virtual Reality Program



INVESTING IN OUR MISSION EXPANDS OUR TRADITION OF EXCELLENCE, ENABLING US TO PROVIDE THE HIGHEST LEVEL OF CARE, SERVICES, AND AMENITIES POSSIBLE.



WHERE THE NEED IS GREATEST/ UNRESTRICTED GIFTS

Your gift provides the flexibility to address immediate priorities. Recent examples include staff training, a new video camera for resident events, medical equipment, and housekeeping department renovations.

Funds Contributed YTD 2025:
\$47,900/ 9 Gifts

Funds Contributed 2024:
\$60,100/ 24 Gifts

BENEVOLENT CARE FUND



Our residents in need will always have a home thanks to our **Benevolent Care Fund**.

- Average number of residents who receive supplemental support: 2-3 per year
- Average dollars spent each year: \$120,000

Funds Contributed YTD 2025:
\$600/ 3 Gifts

Funds Contributed 2024:
\$9,100/ 7 Gifts

BENEVOLENT CARE FUND BALANCE: \$770,600



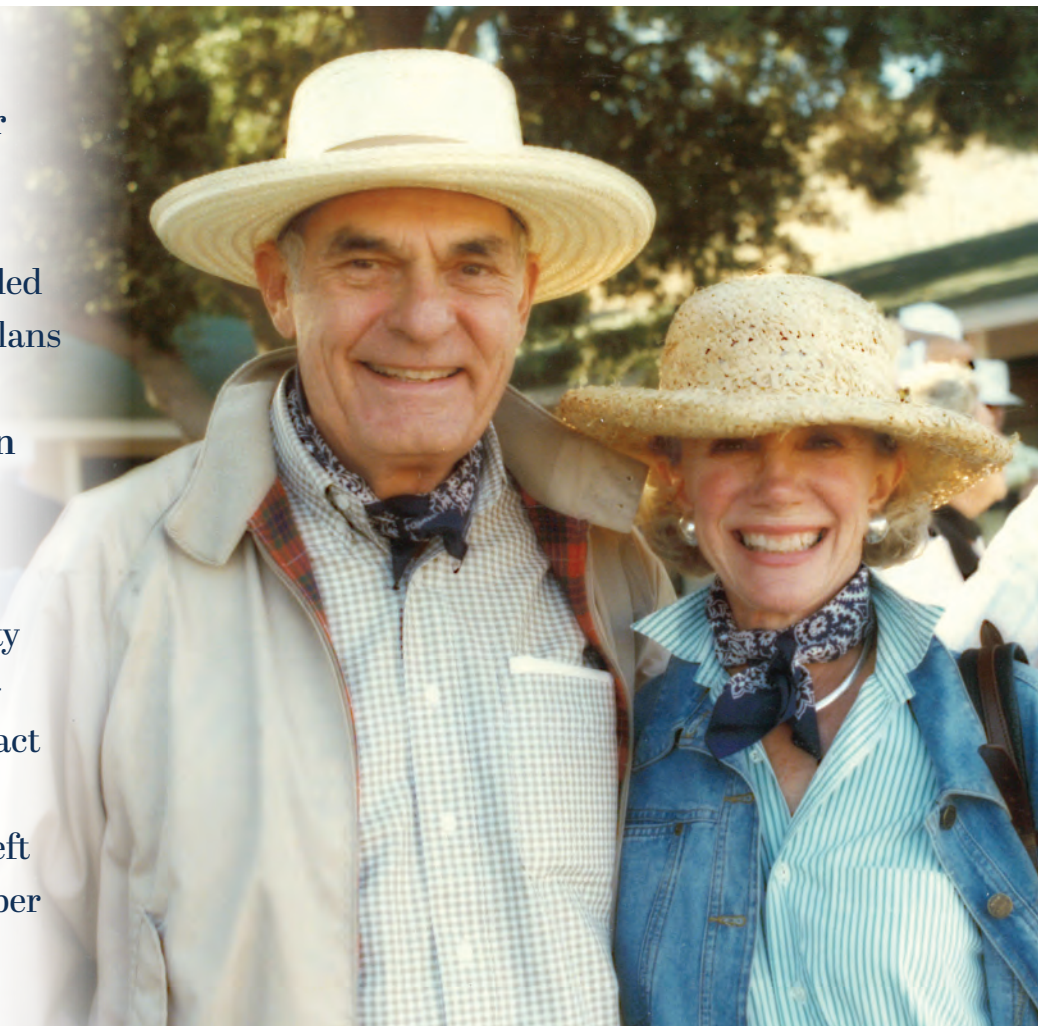
CASA DORINDA ENDOWMENT

give ~ growth ~ grant

A Legacy of Generosity: Honoring Bill and June Kistler

Bill and June Kistler, cherished residents of Casa Dorinda, included our Endowment in their estate plans through the Sequoia Society, helping us surpass the **\$1 million milestone!**

Their extraordinary gift reflects their love for the Casa community and their commitment to our future. We are grateful for the impact they made during their lifetime and the enduring support they left behind. Casa will always remember their generosity and legacy.



Funds Contributed YTD 2025: \$401,500/ 3 Gifts
Funds Contributed 2024: \$29,100/ 21 Gifts
Endowment FUND BALANCE: \$1,154,400

SEQUOIA SOCIETY - PLANNED GIVING



WHAT IS THE SEQUOIA SOCIETY?

The Sequoia Society is Casa Dorinda's Planned Giving Program, offering you the flexibility to designate a planned gift of any amount to the fund of your choice. With more than 130 residents already participating, this society ensures that your legacy supports the fund(s) that are most meaningful to you.

Examples of planned gifts we have received through our Sequoia Society include:

- Support for the creation of our new Personal Care & Memory Care building
- Critical funding for our Employee Emergency Fund
- Benevolent care for residents who have outlived their financial resources
- Significant contributions to Casa Dorinda's Endowment

JOINING IS SIMPLE

There are easy ways to designate your planned gift without revising your estate plan, such as beneficiary designations through your IRA, Donor Advised Fund, or Life Insurance Policy. To learn more about joining the Sequoia Society, please contact a member of the Sequoia Committee: **Peter Beuret, Edie Dinneen, Kate Feldstein, Carole Halsted, Susan Northrop, Wendy Ross, Suzi Schomer, or Lisa Thomas.**



Planned Gifts received since Sequoia Society was established: \$1,400,000
Estimate of Future Gifts Casa will receive: \$7,300,000



5th Annual Sequoia Celebration



*Our Sequoia Society
Annual Dinner honors
and celebrates our
current and past members.*

*Sequoia
Society*
ANNUAL DINNER

*SAVE THE DATE:
September 10, 2025*

EMPLOYEE SUPPORT FUNDS

The Employee Emergency Fund provides tax-free grants of up to \$5,000 to support staff experiencing financial hardship due to an emergency.

**MORE THAN 270 GRANTS HAVE BEEN AWARDED SINCE
THE FUND WAS CREATED, TOTALING \$670,000!**

EMERGENCY CATEGORIES:

Medical • Dental • Home • Funeral Expenses • Transportation • Extreme Circumstances

EMERGENCY FUND IMPACT

- 2025: 17 grants totaling \$52,000
- 2024: 46 grants totaling \$157,000

Funds Contributed YTD 2025:
\$17,400/ 43 Gifts

Funds Contributed 2024:
\$156,000/ 78 Gifts

A HEARTFELT THANK YOU TO THE RESIDENTS AND THE EEF COMMITTEE:

“Your help with my security deposit and first month’s rent made a huge difference when I was struggling both financially and emotionally. Your generosity comes at just the right time for so many of us going through hard moments, and it doesn’t go unnoticed. Your impact goes far beyond financial help. You remind us that we’re part of a team that looks out for one another. Thank you again from the bottom of my heart.”

—Azucena Sanchez, Human Resources Department



For questions about the EEF, please contact Resident Chair Nina Schooler at 805.969.8679.

EMPLOYEE EMERGENCY FUND BALANCE: \$190,400

EMPLOYEE APPRECIATION FUND

With heartfelt gratitude, we thank all the residents who generously contributed over \$570,000 to the 2024 Appreciation Fund. Your support provided year-end holiday bonuses to more than 250 staff members. While these gifts are not tax-deductible, your generosity means the world to our team.





SCHOLARSHIP ANNUAL FUND

empower ~ merit ~ educate

The Annual Fund meets our immediate need to provide scholarships to our dedicated staff and their family members during the current application season.

SCHOLARSHIPS AWARDED

2025: 45 scholarships, totaling \$217,500

2024: 33 scholarships, totaling \$161,000

AVERAGE SCHOLARSHIPS

4-Year College Scholarship Awards: \$7,500

2-Year Colleges/Vocational Schools: \$2,500



“I am a graduating senior at Cal State University, Channel Islands. This scholarship alleviated the financial burden of tuition, allowing me to focus more intently on my studies and extracurricular involvement, which led to an invitation to become one of seven inductees into the Lambda Pi Eta, National Communication Association Honor Society.

Your investment in my education is not only a financial contribution but also an affirmation of my potential. I am inspired by your commitment to assisting students in their educational journeys and hope to one day give back to others in a similar way.”

—Sierra Beltran

Funds Contributed YTD 2025: \$8,200/ 11 Gifts

Funds Contributed 2024: \$68,620/ 54 Gifts

ANNUAL FUND BALANCE: \$32,300

HONORARY MATCHING GIFT ANNOUNCEMENT

The Kirby-Jones Foundation has committed a \$20,000 Matching Gift Grant in honor of Nancy & Jim Taylor to support our Casa Dorinda Annual Scholarship Fund!



"We are both thrilled and humbled to be honored with this generous gift to Casa Dorinda from the Kirby-Jones Foundation, a family trust that has recently established the Billy Taverner Music and Dance Memorial with a similar contribution.

We have known this wonderful family for over 50 years through four generations and are delighted to be associated with the Kirby-Jones Foundation's handsome matching grant to Casa Dorinda's Annual Scholarship Fund, an initiative we strongly support."

—Nancy & Jim Taylor



SCHOLARSHIP ENDOWMENT

invest ~ inspire ~ educate

The Endowment provides long-term support by strengthening our ability to fund scholarships through investment earnings.

Funds Contributed YTD 2025: \$17,900/ 15 Gifts

Funds Contributed 2024: \$116,700/ 38 Gifts

ENDOWMENT FUND BALANCE: \$866,000



AS PART OF OUR COMMUNITY ENGAGEMENT PROGRAM, CASA DORINDA SUPPORTS THE MONTECITO FIRE DEPARTMENT IN APPRECIATION OF THEIR DEDICATED SERVICE TO BOTH OUR COMMUNITY AND THE GREATER MONTECITO AREA.





YOUR GENEROSITY ADVANCES OUR MISSION

- Enrich the lives of Casa Dorinda residents
- Empower and uplift our dedicated employees
- Expand and elevate our programs and campus
- Strengthen our financial foundation

JOIN US

We invite you to become a loyal donor by making an annual tax-deductible contribution to the fund, program, or project that holds the most meaning for you. Many departments have a “Philanthropy Wish List” - to learn more about these opportunities, please contact Lisa Thomas, Director of Philanthropy, at 805.969.8070 or lthomas@casadorinda.org.

WAYS TO GIVE TO CASA DORINDA

- MONTHLY STATEMENT: add your donation to your Casa statement (see enclosed envelope)
- IRA: make a qualified charitable distribution (contact your IRA custodian) and reduce your taxable income
- DONOR ADVISED FUND: request a grant to the Montecito Retirement Association through your DAF
- STOCK GIFT: donate appreciated stock, receive a charitable deduction and avoid capital gain taxes

Every gift to Casa Dorinda makes a difference.

Thank you for your support!



California's Premier LifeCare Community

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