



Legacy *issue*

Philanthropy at Casa

Spring 2026

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



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 150 members

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

Cover photo (left to right, from the top):

Susan & Arthur Schultz (Mother and Stepfather of Peter Barker), Adele McDermott Mairs (Mother of Brian McDermott), Kathryn Files (Mother of Kathy Lacey), Jean Hayward (Mother of Julia Collins), Lovina & Lawrence Williams (Parents of Dave Williams & Phyllis Grey), Priscilla Small (Mother of Barbara Hadley).

Legacies live on



Betty & Charlie Kase (Aunt & Uncle of Julia Pizzinat)

At Casa Dorinda, more than 20 current residents are second-generation, highlighting the legacy of the Casa family. For this cover, we gathered a small collection of family photographs, recognizing that they offer only a glimpse into the rich and cherished personal histories within our community. Exploring the stories behind each image revealed that each resident gave generously through philanthropy or volunteerism. Some invested in our employees through scholarship support, while others contributed to initiatives such as the Medical Center Campaign in the late 1990s. Today, the tradition of giving continues across generations, and we are honored to steward these lasting legacies.

Remembering Seymour & Shirley Lehrer

Seymour and Shirley Lehrer will always be remembered with gratitude and admiration for their extraordinary philanthropy, at Casa Dorinda and in the greater community.

The Lehrers played a transformational role in the success of Casa Dorinda's Legacy Campaign, making a remarkable \$1.5 million capstone gift that helped the campaign surpass its \$8 million goal. Their generosity supported the creation of the Center for Personal and Memory Care, helping ensure exceptional higher-level care for generations to come.

During the campaign, the Lehrers shared the values that guided their lives: "The way we were raised, contributing to the community was an obligation. We give because we can."

Beyond the Legacy Campaign, they were dedicated supporters of our Employee Emergency, Scholarship, and Appreciation Fund, a testament to their appreciation for our employees.

Their generosity, humor, and belief in giving back will remain an inspiring and memorable part of the Casa Dorinda story.



PHILANTHROPIC INITIATIVES

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

VIRTUAL REALITY PROGRAM



Thank you to our donors, Chuck Atkins & Kristin Demong, Ingrid Brandes, and Dr. David Mahal, whose generous support makes this program possible.

Pictured (left to right): Robert & Alexandra Nourse, and Ingrid Brandes

2026 Funds Contributed to Date: \$109,000 / 12 Gifts

2025 Funds Contributed: \$259,900 / 35 Gifts

COMMUNITY-WIDE PROJECTS:

- Oak Woodlands Revitalization
- Fitness Equipment
- Electronic Healthcare Records
- Dance Classes & Music Performances
- Virtual Reality Program
- Library Books

HEALTHCARE PROJECTS:

- Future Healthcare Project
- Physical Therapy Equipment
- Wound Care Certification
- Sara Steady Transfer Device
- Dementia Training
- Fall Prevention Consultant



FITNESS ENHANCEMENTS

“When we learned that donations could be earmarked towards areas of interest, we decided to contribute towards enhanced equipment in the Fitness Center. This eventually resulted in the acquisition of a new Technogym Dual Adjustable Pulley Trainer. We are very pleased with the end result and happy that others can benefit from it.”

—Richard & Patsy Blake

DINING DELIVERY CART

“The new Dining Services delivery cart has significantly improved meal delivery across campus, helping ensure hot foods stay hot and cold items remain cold. We are grateful to the donors who made this enhancement possible.”

*—Scott Schonzeit,
Director of Dining Services*





Benevolent Care Fund

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

- Estimated number of residents who receive supplemental support: **2-4 per year**
- Estimated dollars spent each year: **\$220,000**

2026 Funds Contributed to Date:
\$3,400 / 3 Gifts

2025 Funds Contributed:
\$3,700 / 5 Gifts

BENEVOLENT CARE FUND BALANCE: \$771,000



“We are happy to support several Casa funds each year through our donor-advised fund and IRA. We recognize the growing need for Benevolent Care as people live longer, and we feel fortunate to call Casa Dorinda our home. We are grateful for the opportunity to help our neighbors in need in our community.”

—Gary & Susan Gulbransen

WHERE THE NEED IS GREATEST

unrestricted gifts

Unrestricted gifts provide the flexibility to address immediate priorities and invest in opportunities that elevate our programs, services and campus. **Examples include:**

- Auditorium Lectern
- Resident Warden Radios
- Vital Signs Machines

2026 Funds Contributed to Date:
\$28,800 / 10 Gifts

2025 Funds Contributed:
\$130,660 / 44 Gifts



CASA DORINDA ENDOWMENT

give - growth - grant

Endowment gifts are invested for the future, funding projects that enhance the lives of our residents.

2026 Funds Contributed to Date: \$9,500 / 4 Gifts
2025 Funds Contributed: \$421,600 / 12 Gifts
ENDOWMENT FUND BALANCE: \$1.2 Million

SEQUOIA SOCIETY - PLANNED GIVING



“We are very happy to support Casa and thrilled to be part of such a special place. We discovered that joining the Sequoia Society was easier than we expected. Rather than rewriting our estate documents, we updated the beneficiary designation on our IRA, which took only five minutes. There are also financial advantages to using retirement assets for charitable giving, as IRAs are taxable when passed on to heirs. We are honored to advance the mission of Casa Dorinda and support a community we now call home.”

—Charles & Jean Held

WHAT IS THE SEQUOIA SOCIETY?

- The Sequoia Society recognizes individuals who have made provisions for Casa’s long-term success through their estate plan with a gift that is received after their lifetime.
- It is a giving vehicle rather than a “fund,” with the option to designate a planned/legacy gift to the area of greatest need or to a specific fund(s).
- There are simple ways to designate your future gift, of any amount, without revising your estate plans, such as beneficiary designations through your *IRA, Donor-Advised Fund, Bank or Brokerage Account, or Life Insurance Policy*.

SAVE THE DATE

Sequoia Society
ANNUAL DINNER

SEPTEMBER 16, 2026 AT 5:00 PM

Your Legacy



Your Impact

Impact of planned gifts we have received through our Sequoia Society:

- Support for the Center for Personal Care & Memory Care
- Employee Emergency Fund Grants
- Benevolent Care for Residents in Need
- Casa Dorinda's Endowment for Current & Future Residents

To learn more about joining the Sequoia Society, please contact a member of the Sequoia Committee:
(left to right) **Suzi Schomer, Carole Halsted, Susan Northrop, Peter Beuret, Kate Feldstein,**
and Lisa Thomas. Not pictured – **Wendy Ross.**



Estate Gifts Realized Through the Sequoia Society: \$1.4 Million
Estimated Future Estate Gifts: \$8 Million

SUPPORTING CASA DORINDA EMPLOYEES



*“Dear Residents,
You are so exceptionally nice.
In my case, when I am not
feeling well, to know that you
care about my well-being really touches my
heart. I am so grateful for the EEF grant and
for everything you do for me and others. I
remember when the late Mr. March asked me
what I thought about the Employee Emergency
Fund when he was creating it. I have seen many
employees benefit from emergency grants.
Thank you all from the bottom of my heart for
your support.”*

—Helen Maryska, Dining Manager

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

- Emergency Categories: Medical, Dental, Home, Funeral Expenses, Transportation and Extreme Circumstances.
- The top two areas of need are Home – Rent/Mortgage and Transportation.
- To date, the EEF has been able to fulfill ALL eligible emergency grant requests.
- Nearly 320 grants have been awarded, totaling \$817,000

To learn more about the Employee Emergency Fund, please contact Chair Nina Schooler at 805.969.8679.

EMERGENCY FUND IMPACT:

- **2026:** 12 grants to date, totaling \$42,000
Average grant: \$3,500
- **2025:** 46 total grants, totaling \$160,000
Average grant: \$3,500

2026 Funds Contributed to Date: \$40,900 / 31 Gifts

2025 Funds Contributed: \$99,900 / 114 Gifts

EMERGENCY FUND BALANCE: \$165,000





SCHOLARSHIP ANNUAL FUND

empower - elevate - 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

2026: 43 scholarships, totaling \$217,500

2025: 45 scholarships, totaling \$217,500

AVERAGE SCHOLARSHIPS

4-Year Colleges/Vocational Schools: \$7,500

2-Year Community Colleges: \$2,500



“My goal is to earn a Master of Science in Nonprofit Leadership and Management and pursue a career with a nonprofit organization that supports low-income families and children affected by poverty. From a young age, I have had a giving spirit, and that passion continues to inspire my goals and future career path. Receiving this scholarship motivates me to complete my degree while easing financial concerns. I am thankful to be part of a company that offers benefits like the Scholarship Fund. Without this support, students like me might not have the chance to realize their career ambitions.”

—Maria Perez, Dining Services

2026 Funds Contributed to Date: \$18,000 / 20 Gifts

2025 Funds Contributed: \$226,400 / 118 Gifts

ANNUAL FUND BALANCE: \$93,800




SCHOLARSHIP ENDOWMENT

invest ~ support ~ educate

The Endowment provides long-term support and strengthens our ability to fund scholarships through investment earnings. Up to 4.5% of the Endowment may be distributed annually if needed.

To learn more about the Casa Scholarship Funds, please contact
Chair Janet DeBard at 805.969.8660.



WE ARE PENN STATE

“I am proud of my son, Dr. Carlos Contreras, who attended UCLA for four years and Penn State College of Medicine for four years, where he recently graduated. He has been a dedicated and committed son and student, motivated to complete his education. He will begin his practice in July at a hospital in Washington, DC. I have been employed at Casa Dorinda for over ten years, and our family is very grateful for the support he has received from the Casa Scholarship program.”

—Gabriel Contreras, Dining Services

2026 Funds Contributed to Date: \$17,300 / 8 Gifts

2025 Funds Contributed: \$21,400 / 19 Gifts

ENDOWMENT FUND BALANCE: \$990,000



CASA DORINDA'S CNA PROGRAM

In 2023, Casa Dorinda launched its Certified Nursing Assistant (CNA) training program to help address the growing need for CNAs in our community.

Students complete 60 hours of online coursework followed by 100 hours of hands-on clinical training at Casa Dorinda's Medical Center. The program partners closely with students from LA Skills Academy and Santa Barbara City College's Health Academy.

Through this initiative, Casa employees from Personal Care, the Medical Center, Housekeeping, and Security have advanced their careers. Today, 12 CNAs trained through the program are employed in Personal Care and the Medical Center.

To date, Casa Dorinda has trained nearly 100 CNAs—a significant contribution to our community.





CASA DORINDA

YOUR GIFTS FURTHER OUR PHILANTHROPIC MISSION

- Enrich the Lives of Casa Residents
- Enhance our Programs and Campus
- Support and Lift Up our Employees
- Strengthen our Financial Foundation

JOIN US

We invite you to become a loyal donor by giving annually to the fund, program, or project most meaningful to you. Your donation can be directed to more than one fund.

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 (EIN 23-7425754) through your DAF.
- STOCK GIFT: donate appreciated stock, receive a charitable deduction and avoid capital gains taxes
- CREDIT CARD: donate online: www.casadorinda.org/philanthropy > DONATE TO CASA DORINDA button.

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.

Every gift to Casa Dorinda makes a difference.

Thank you for your support!



CASA  DORINDA

California's Premier LifeCare Community

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Casa Dorinda is a private LifeCare CCRC Community, owned and operated by the Montecito Retirement Association, a nonsectarian, nonprofit, tax-exempt organization, EIN #23-7425754. State of California Licenses RCFE #421700160, SNF #050000112, CCRC Certificate of Authority #126.