



Charitable Service Trust



Photo by Christopher Wilson/DOD



# 2022

## Annual Report



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## A Message From the Trust

Dear Caring Friend,

We are truly grateful for your generous support of the DAV Charitable Service Trust over this past year. Thank you for supporting our mission of giving back to the men and women who have been forever changed by their service to our nation.

Despite all of us continuing to feel the effects of inflation, you have offered a sense of stability and peace of mind for nonprofits weathering the financial storms.

As this report highlights, it's a collective effort that enables us to serve those who have sacrificed for our country. Because of the financial gifts you have entrusted us with, we are able to seek, find and support the very best organizations helping veterans and their families.

The impact of your gifts is not only life-changing but also lifesaving. That is because the Trust continues to support organizations that have a direct role in suicide and crisis intervention, mental health treatment and therapy. Grants have gone to nonprofits dedicated to helping break the pattern of veteran homelessness. We have also supported adaptive sports programs, legal assistance organizations, service dog programs and veteran employment services.

I hope reading and learning about the variety of nonprofits in this report is heartwarming for you. Behind each organization are people committed to serving veterans. Because of you, the Trust is in a position to abundantly fuel passion and creativity, expanding what is offered to veterans in need.

As long as there are ill and injured veterans in need, the Trust will continue the role it has fulfilled for the past 36 years in empowering them to live high-quality lives with respect and dignity. You are intrinsically connected to that mission. On behalf of every organization and veteran touched by your generosity, thank you for being a light in this world.



A handwritten signature in black ink that reads "Richard E. Marbes".

**Richard E. Marbes**  
President



Photo by Petty Officer 1st Class Matthew S. Masaschi/Coast Guard



# The Mission of the Trust

By supporting the DAV Charitable Service Trust, you help to fulfill a focused and noble purpose: empowering veterans to lead high-quality lives with respect and dignity.

To carry out this responsibility, the DAV Charitable Service Trust supports physical and psychological rehabilitation programs, enhances research and mobility for veterans with amputations and spinal cord injuries, benefits aging veterans, aids and shelters veterans experiencing homelessness, and addresses the needs of veterans returning from recent combat service.

# Victories for Veterans





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**Our nation's heroes leave nothing to chance when it comes to defending our country. And we, as concerned citizens, owe them nothing less than the best when they are changed as a result of their service.**

By supporting the DAV Charitable Service Trust, you help veterans connect with new possibilities and address the most challenging hurdles that stand between them and their maximum potential.

The programs that benefit from the Trust address a wide range of physical and psychological barriers that can affect a veteran's quality of life. The Trust identifies and assists initiatives that enhance research and mobility for veterans who've lost limbs or experienced spinal cord injuries, help our aging veterans enjoy a sense of dignity and peace, provide shelter to veterans experiencing homelessness and give them a path toward a fulfilled life, and give caregivers and families of veterans the tools and resources they need to lead sustainable and enriched lives.

The Trust looks proactively at ill and injured veterans of all generations, with a particular focus on those who have served in recent wars. The goal: Help succeeding generations confront the barriers of war's wounds so they can make the most of their lives following trauma in the military.

## **WHEN AMERICA'S VETERANS WIN, WE ALL WIN**

The transition to civilian life is a major adjustment for those who served—especially for those who were changed as a result of their service. The support and stability service members become accustomed to vanishes the day they are discharged. When that day comes, the culture and structure they know are taken away, and the bonds of service—of counting on one's fellow service members—are made distant.

Veterans are resilient by nature, but even the hearts of warfighters can be challenged when the foundation they know is removed and cannot fully be replaced. This is especially true for recent veterans, who may have endured multiple combat deployments as our nation waged war on two fronts.

The Trust looks for initiatives that ease this transition and reconnect veterans with opportunities to enhance their health and outlook on life—for them and their families.

## Victories for Veterans *concluded*



in grants were awarded  
throughout the  
United States in 2022.

More than  
**95 cents**

out of every dollar donated  
directly supports programs that  
help veterans and their families.



Historically, funds have been awarded to support:

- Programs ensuring quality health care for veterans.
- Assistance to veterans with post-traumatic stress disorder, traumatic brain injury, military sexual trauma, substance use disorders, and related or co-occurring conditions.
- Programs enhancing mobility for veterans with amputations, spinal cord injuries and other physical disabilities.
- Additional initiatives addressing the needs of veterans and caregivers or families from each era of conflict.

To date, funded programs and projects aid in providing a number of necessities to veteran clients and their families in each service region. Grants are typically distributed to offer:

- Food, shelter and other necessary items for veterans and their families who are homeless or at risk for homelessness.
- Mobility items or other assistance specific to veterans with blindness, vision loss, hearing loss or amputations.
- Qualified, evidence-based therapeutic or recreational activities for veterans and their families.
- Physical and psychological rehabilitation projects.
- Education, training and career readiness.
- Animal-assisted therapy.
- Other forms of support, as appropriate, for short- or long-term relief for veterans, caregivers and their families.

The Trust carefully evaluates and addresses the most vital needs of wounded veterans and their families while empowering them to maximize their quality of life after service. Throughout these pages, we highlight the past year's grant recipients who demonstrate the influence the Trust makes in the lives of the community it serves. We are grateful to those dedicated patriots who serve and volunteer to enact these important programs.

More than 95 cents out of every donated dollar went directly to support programs that contribute to the victories the Trust makes possible. Notably, the Trust has received the coveted 4-star rating for "sound fiscal management and commitment to accountability and transparency" and three perfect score ratings from Charity Navigator. Since first being evaluated in 2002, the Trust has received the 4-star rating more than 15 times and, most recently, earned the Accountability & Finance, Culture & Community, and Leadership & Adaptability beacons under the new Encompass Rating System. As Charity Navigator is the nation's largest independent charity evaluator, this acknowledgment speaks volumes about the Trust's careful and efficient stewardship of donated funds.

As a testament to the Trust's commitment to sharing information, the Trust also received Candid's Platinum Seal of Transparency in 2022.



# Supporting Team

Most of the victories veterans enjoy through the DAV Charitable Service Trust are made possible by generous individuals making personal donations or participating in workplace giving campaigns and matching gift programs. We have also received tremendous assistance from various companies who recognize and contribute to our cause.

Specifically, the Trust extends appreciation to Ford Motor Co., The Walt Disney Co., The Wild Flower Foundation Inc., The Daphne Seybolt Culpeper Foundation, Alice F. & Cortland J. Knipe Charitable Trust, The Kauffmann Foundation, Milton and Fannie Brown Family Foundation, Bessemer Trust Co., Arconic Foundation, Kenneth W. Scott Foundation, Counihan Family Foundation, Cranaleith Foundation, and many other corporations and foundations that supported the Trust so graciously in 2022.



# The Victories

## ENHANCED QUALITY OF LIFE

Veterans can face unforeseen consequences as a result of their service injuries. For some of our most profoundly injured veterans, a victory can be as simple as the restoration of life's most basic joys. Fortunately, the DAV Charitable Service Trust has dedicated itself to helping entities provide services that substantively improve veterans' quality of life.

### GRANT SPOTLIGHT



One of those organizations is USA Cares Inc. What started as a local charity in Louisville, Kentucky, after Sept. 11, 2001, has evolved into a national organization that provides financial relief to post-9/11 veterans and their families in need.

Over the years, USA Cares has helped thousands of veterans experiencing temporary financial hardships by covering costs including rent, mortgages, car payments and utility bills. Annice McEwan, USA Cares marketing and communication manager, said this assistance can help prevent more catastrophic outcomes, noting that research shows a data correlation between compounding financial hardships and veteran suicide.

"We keep them in their homes. We keep their families together so that we can quite literally save lives," she said.

By design, the process to receive financial relief from USA Cares is not complicated. Veterans can get what they need quickly and focus on things that may need their more immediate attention. But one condition is that recipients also receive financial literacy education from the organization to help prevent future setbacks.

The Trust's 2022 grant to USA Cares was directly responsible for helping 73 veterans get out of difficult financial situations.

**Top photo:** (From left) USA Cares team members Paula Redding, James Bradham and Stephen Brown pose for a photo at a fundraising event for the organization. USA Cares provides immediate financial relief to veterans in need. **Bottom photo:** Sarah, a Marine veteran, and her daughter sent USA Cares a thank-you note after recent assistance. Every veteran assisted receives financial literacy training along with their financial relief.

- Audio Information Network of Colorado received funds from the Trust for its work to provide listening equipment, technical support, training curriculum and audio services to veterans with blindness or low vision.
- The Trust provided funds to LifeCare Alliance's Help-at-Home program, which provides housekeeping and personal care services to low-income, older and injured veterans in Ohio's Franklin and Madison counties.
- Funds from the Trust supported Virginia-based Quality of Life Foundation Inc.'s nationwide Wounded Veteran Family Care program, which provides respite services to caregivers and family members of veterans.



## HOUSING & EMPLOYMENT

Housing and employment are major components for veterans as they work to return to normalcy after sacrificing for our freedoms. The Trust proudly supports numerous organizations dedicated to helping veterans secure housing and employment when necessary.

### GRANT SPOTLIGHT

**F**ounded in 1978 as the Dallas Tenants Association, Housing Crisis Center in Dallas has grown over the years and has several programs to help those in its community. One program, the Veterans Housing Partnership, focuses on disabled veterans experiencing chronic homelessness.

To address these veterans' specific needs through this program, the center provides services including permanent apartment housing, case management, employment coaching, financial education and government benefits advocacy.

Dave, a military veteran whose last name is withheld for privacy, came to the center several years ago with drug and alcohol addiction. His marriage had fallen apart and he experienced chronic depression, which led to his substance use. He lost his construction job and couldn't hold steady employment. Eventually, he became chronically homeless.

Dave was drifting from one job to the next when he was referred to the Housing Crisis Center and accepted into the veterans program. The program gave him access to the center's empowerment, employment and financial coaches as he navigated through an individualized plan for recovery and independence.

He's been clean and sober for three years and receives income from his disability benefits and a part-time job. He also volunteers at a local animal shelter.

After a long journey to recovery and out of homelessness, Dave said he's an "ordinary guy" now thanks to the help he received from the Housing Crisis Center.



- In Florida, the Trust assisted Camillus House Inc. by supporting its Housing Veterans project in providing deposits, furniture and supplies to veterans transitioning to independent housing.
- The Trust provided funds to Community Hope Inc. to support its efforts in providing transitional housing and mental health, food and supportive services to ill and injured veterans and their families in New Jersey.
- The Trust awarded funds to Mercy Housing Lakefront in Illinois to support its Resident Services for Veterans Program in providing case management services at Cannon Place, a housing facility for veterans and their families who are homeless or at risk of homelessness.

## GRANT SPOTLIGHT



### ADAPTIVE SPORTS & OUTDOORS THERAPY

Maintaining physical health and preserving an active outdoor lifestyle become more difficult when an injury drastically changes one's physical abilities. Overcoming new challenges and having the opportunity to reconnect with the warrior within are critically important steps toward recovery.

Chelsea Elder and the rest of her team at Colorado-based Adaptive Adventures know how freeing adaptive sports can be for ill and injured veterans and their families. Whether through skiing, cycling, rock climbing, dragon boat racing or any other activity it offers, Adaptive Adventures facilitates ways for veterans with disabilities to enjoy a level of activity they previously had and helps them face life's daily challenges.

"Post injury or illness, it can seem that a lot of the new-normal daily tasks are almost insurmountable," Elder said.

"But when a family comes out together and they are able to kayak for the first time or ski or cycle together, it really helps to show not only the veteran but the family as well that if they can do these things, it makes the other daily living tasks easier."

The skills gained from learning an adaptive sport transfer to other aspects of a veteran's life, but because of the Trust's grant, Elder said veterans don't have to learn on their own. The funding allows Adaptive Adventures to include families and care teams in the recreational experience, something many other military-focused grants don't support. This inclusion helps reduce some of the potential barriers to participation by sharing the burden of absorbing all the information they need to initially learn.

"It really helps support the veteran all around," Elder said.

The Trust also allows Adaptive Adventures to expand its offerings into underserved areas while training veterans with disabilities to run those programs.

"We love being partners, and we want to continue to expand the work we do together," Elder said.

From dragon boat racing to cycling, Adaptive Adventures provides adaptive sports experiences to ill and injured veterans and their families. These activities help veterans learn to overcome daily challenges while enjoying a level of activity they previously had.

- New York-based Achilles International received support from the Trust for its Freedom Team Program that supports ill and injured veteran participation in marathon activities and fitness challenges across the country.
- The Trust awarded funds to Adaptive Sports Program New Mexico Inc. to support ill and injured veterans and their families' participation in adaptive sports programming and the purchase of related equipment.



## ANIMAL-ASSISTED THERAPY

Service dogs have long been heralded as great assets for ill and injured veterans, and other animals are also demonstrating the capacity to assist in the recovery of those with physical and psychological barriers incurred in service.

### GRANT SPOTLIGHT

**F**or Air Force veteran Gary, whose last name is withheld for privacy, being paired with Ruby, a female Labrador retriever, was a life-changing experience.

“I knew that a service dog would help, but I was surprised by both the way she helps and how much of an impact it has,” he said. “The first time she noticed my anxiety and interrupted it by putting her paw on my leg, I was so caught up in thinking, ‘Oh my god! She did the thing!’ Whatever it was that was bothering me faded away as I gave her treats and some scratches.”

Gary and Ruby were brought together by American Humane thanks in part to a Trust grant that helps fund their Pups4Patriots program. Through the program, veteran/service dog teams are trained and paired to help those experiencing post-traumatic stress or the effects of traumatic brain injuries.

Emily Sparks, the organization’s director of major gifts, said that the Trust directly assisted 17 veterans who came through the program in 2022. Pups4Patriots helps veterans in Arizona, California, Florida, Idaho, Michigan, North Carolina, Oklahoma and Tennessee. At no cost to the veteran, the program covers the entire placement process—training the service dog as a puppy, partnering the right dog with the veteran, training the pair together to facilitate the bonding connection and evaluating the fit.

“We are so grateful to the [Trust] for being able to provide those 17 additional healing leashes in 2022,” said Sparks. “We’ve had a wonderful partnership with you all, and we couldn’t be more grateful.”



- In New Mexico, Assistance Dogs of the West received support from the Trust for its Warrior Canine Connection program, which teaches veterans how to train service dogs for placement with other veterans.

Pups4Patriots connects veterans to service dogs at no cost to the veteran. Their program covers the entire placement process: training the puppy, facilitating placement, training the veteran and evaluating the fit. Air Force veteran Gary, pictured with Ruby, said having a service dog has had a profound effect on calming his anxiety.

## CREATIVE HEALING

Military service ingrains veterans with a sense of selflessness. Their humility and focus on the team over the individual make any form of self-glorification unthinkable. But after they experience trauma in wartime service, the ability to express themselves and process deep and complicated emotions can be extremely therapeutic. These creative outlets provide a great vehicle for helping wounded veterans rediscover their sense of self-worth and learn more about themselves and others.

### GRANT SPOTLIGHT



**S**tack Up, a nonprofit in California, focuses its mission on combating veteran suicide through video games. Founder Stephen Machuga said he never intended for Stack Up to enter into the mental health arena. But because gaming is such a popular pastime for many post-9/11 veterans, he found that it's an effective way to get veterans to talk with someone who can provide crisis intervention and suicide prevention support.

"The gaming is a candy-coated shell of the therapy we're able to provide them," he said.

Stack Up staffs an around-the-clock team of trained volunteers and shift supervisors for its Overwatch Program, which uses Discord, an online social network that's popular with gamers, to connect with veterans who are seeking help. Volunteers can direct those veterans to private chat channels to assist with finding mental health resources and support services or to just talk while playing a video game.

The Trust provided funds to support this initiative, which Machuga said helped more than 400 veterans in 2022. The money came at a much-needed time, when he was having hard conversations about cutting back the operating hours of the Overwatch Program.

"I don't want to do 9 to 5," he said. "There are too many organizations that do that already. Suicide is a 24-hour thing—especially in the middle of the night when an individual's therapist, friends and family are all asleep. We need to be 24/7.

"The Trust definitely helped keep the flame alive."

Stack Up uses video and tabletop gaming as an entry point to promote mental health and combat veteran suicide. Their Overwatch Program is an around-the-clock team of volunteers and supervisors on the online social network Discord who can connect with veterans seeking help.

- The Trust provided funding for Tennessee-based REBOOT Recovery, which provides nationwide support for veterans' participation in therapeutic and educational courses covering military-specific trauma.
- Samaritan Center in Texas received funds from the Trust to provide mental health treatment to ill and injured veterans, service members and their families through their Hope for Heroes program.

## The Victories *concluded*

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### LEGAL ASSISTANCE & EDUCATION

The transition to meaningful civilian life can be a rocky road for veterans changed in service. The Trust proudly supports numerous organizations dedicated to ensuring veterans achieve justice, vocational training and placement in fulfilling careers.

- The Trust granted funds to Injured Marine Semper Fi Fund in California to support its nationwide Apprenticeship Program in providing veterans with employment assistance, short-term vocational education and mentorships with industry experts.
- New York Legal Assistance Group's LegalHealth Division received funds to provide free legal services to veterans at Department of Veterans Affairs medical facilities throughout the New York City area.
- California-based Workshops for Warriors received support from the Trust for its Advanced Manufacturing Training for Young Veterans program, which provides machinery career field education and job placement assistance to veterans.





# A Triumph for the Bold

The DAV Charitable Service Trust is proud of its legacy of service to empower veterans. The unique programs outlined in these pages illustrate the life-changing assistance provided to those who served, allowing veterans of all generations to find their victories.

Thanks to the loyal supporters who generously donate to the Trust each year, veterans are able to access the resources and services they need to lead high-quality lives with respect and dignity.



# 2022 Financials

## SUPPORT AND REVENUE

### Support

Contributions—Without Donor Restrictions	\$11,671,767
Contributions—With Donor Restrictions	1,336,372
Contributions of Charitable Gift Annuities	316,973
Bequests	3,553,905

<b>Total Support</b>	<b>\$16,879,017</b>
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### Revenue

Interest and Dividends Income—Net	\$1,030,530
Gain (Loss) on Sale of Investment Securities	2,054,751

<b>Total Revenue</b>	<b>\$3,085,281</b>
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<b>TOTAL SUPPORT AND REVENUE</b>	<b>\$19,964,298</b>
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## EXPENSES

<b>Program Services</b>	\$9,950,136 (97%)
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### Supporting Services

Management and General	\$223,236 (2%)
Fundraising	93,336 (1%)

<b>TOTAL EXPENSES</b>	<b>\$10,266,708</b>
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<b>Excess of Support and Revenue Over Expenses</b>	<b>\$9,697,590</b>
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Change in Unrealized Depreciation of Investments	(\$9,371,647)
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Charitable Gift Annuity Valuation Adjustment	\$173,812
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## NET ASSETS

<b>Change in Net Assets</b>	<b>\$499,755</b>
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Net Assets—Beginning of Year	52,521,695
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Net Assets—End of Year	53,021,450
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<b>Total Without Donor Restrictions</b>	<b>\$52,938,841</b>
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<b>Total With Donor Restrictions</b>	<b>\$82,609</b>
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<b>TOTAL NET ASSETS—End of Year</b>	<b>\$53,021,450</b>
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The complete financial statements have been audited and received an unqualified statement.  
A copy of the audited statement is available online at [cst.dav.org/resources](http://cst.dav.org/resources).



# Governing Board

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DAV National Headquarters  
Erlanger, Kentucky



Photo by Lance Cpl. Zachary M. Ford/Marine Corps

Photo by Mass Comms Specialist 2nd Class Daniel M. Young/Navy



## NONPROFIT STATUS

The DAV Charitable Service Trust is a tax-exempt organization, and all contributions made to it are tax-deductible.

The DAV Charitable Service Trust is a nonprofit organization incorporated in the District of Columbia. It is exempt from tax under Title 26 U.S.C. §501(c)(3). Contributions to the Trust are deductible pursuant to Title 26 U.S.C. §170(c).

The DAV Charitable Service Trust has received the coveted 4-star rating from Charity Navigator more than 15 times since first being evaluated in 2002 and two perfect overall scores. As Charity Navigator is the nation's largest independent charity evaluator, this acknowledgment speaks volumes about the Trust's careful and efficient stewardship of donated funds. The Trust also received the 2022 Platinum Seal of Transparency from GuideStar by Candid.



Photo by Staff Sgt. Mercedes Wilds/Air National Guard



Photo by Sgt. 1st Class Terra C. Gatti/Army National Guard



## Charitable Service Trust

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