



Charitable Service Trust



**2023**  
Annual Report

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On Cover: Photo by Staff Sgt. Bailee A. Darbasie/Air Force

## A Message From the Trust

Dear Caring Friend,

In the past year, you've provided hope, restored dignity, validated service, strengthened families, allowed healing, eased burdens and saved lives. On behalf of every ill and injured veteran whose life you've touched, thank you for giving generously to the DAV Charitable Service Trust.

Without your gifts, the organizations highlighted in this report can't do what they do for the men and women who have been forever changed by their service to our nation. Your significance as difference-makers has endured for nearly four decades.

When DAV established the Trust in 1986, it was in response to massive government spending cuts that threatened care and services veterans and their families needed. We didn't stand idle and simply allow the fleeting and ever-changing priorities of Congress dictate the quality of services our nation's veterans need.

You don't stand idle either. You've stepped up and stood alongside the Trust, giving financially to ensure a vast network of nonprofits could function no matter what. You've provided reassurance to millions of veterans that they're seen, known and cared for. You filled a looming gap that would've broken our nation's promise to its veterans.

Every day, we hear stories from organizations about the positive results that have come from the Trust's investment in their missions. A few of them are included in this report to highlight some of these successes that you as difference-makers have had a hand in.

This was a historic year for the Trust, with grant distributions totaling nearly \$21.5 million. When we started 37 years ago, our grants were north of \$600,000. I point these numbers out only to highlight what can happen when caring individuals band together for a purpose. Each one of those dollars given is sacred and represents your values and priorities. We don't take lightly the responsibility to ensure careful, thorough review of the nonprofits we support through your giving.

There are two takeaways I hope you garner as you read this report. First, the needs of our ill and injured veterans persist, and they will as long as we have a military. Second, your support has profoundly helped so many of our nation's heroes and their families live high-quality lives with respect and dignity.



**Richard E. Marbes**  
President







# 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

Michael Naranjo





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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 2023.

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 injuries, 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 experiencing or at risk for homelessness
- Mobility items or other assistance specific to veterans with blindness, vision loss, deafness, 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 continually received the coveted 4-star rating for "sound fiscal management and commitment to accountability and transparency" and multiple perfect-score ratings from Charity Navigator since first being evaluated in 2002. It has also earned the Accountability & Finance, Culture & Community, and Leadership & Adaptability beacons under the Encompass Rating System and is listed as one of Charity Navigator's "Most Followed Charities". As Charity Navigator is the nation's largest independent charity evaluator, these acknowledgments speak 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 2023.



# 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., Mattick Family Foundation, Alice F. & Cortland J. Knipe Charitable Trust, Chris & Melody Malachowsky Family Fund, Booz Allen Hamilton, U.S. Family Foundation Inc., Counihan Family Foundation, Alfred Phillips Foundation, and many other corporations and foundations that supported the Trust so graciously in 2023.



# The Victories

## ENHANCED QUALITY OF LIFE

Veterans can sometimes 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



Take Clark, the founder of Save A Warrior, is on a lifesaving mission to help veterans with complex post-traumatic stress unlock a journey to healing.

The beginning of this journey starts with participants attending a weekend-long cohort at the organization's Warrior Village in Ohio. The experience is rooted in community-based intervention practices that have been around for thousands of years but updated and contextualized for veterans.

"It's very intense. It's very in-your-face. It's excruciating at times," said Clark. "We take the best of science, the best of all things spiritual, and there's this blending and synthesis of a conversation that a person has essentially been waiting to have their entire life, they just didn't know where to find it."

Clark said the key to Save A Warrior's effectiveness

is to deal with a person's post-traumatic stress by first addressing childhood trauma, which is a common experience of each participant. By confronting the shame that is often still present from that trauma, they can begin to address the moral wounds from their adult experiences.

"People are understanding that there's this thing under the thing," said Clark. "Our folks come here because there's a profound lack of workability in their lives and they don't know what they don't know."

The weekend experience is just the beginning of the journey. The lifesaving work continues through a 500-day plan that alumni must be willing to participate in along with their community of practice if they want to experience healing.

Save A Warrior brought nearly 400 veterans through the program in 2023 and has served more than 2,400 veterans in its 12-year existence. The Trust's support has allowed the program's staff and cohort participants to continue operating in a safe, comfortable environment.

"[Save A Warrior] is a great rocket, but that rocket needs fuel," said Clark. "[The Trust] is the fuel in that rocket."

Save A Warrior starts with a weekend-long immersive intervention experience that brings cohorts of at-risk veterans together to address the challenges associated with post-traumatic stress disorder. This is the beginning of a journey that lasts 500 days and helps veterans find community and purpose.



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- In Pennsylvania, Twilight Wish Foundation received funds from the Trust to provide “Simple Needs,” “Celebrating a Life” and “Living Life to the Fullest” financial grants to older veterans.
  - The Trust provided funds to Massachusetts-based Vietnam Veterans Workshop Inc., doing business as New England Center and Home for Veterans, to support its Senior Veteran Wellness Program in providing stabilization services to veterans who are 55 and over.
  - Funds from the Trust supported Mental Health America of Greater Houston Inc. in providing service-related mental and behavioral health needs through its Veterans Behavioral Health program for veterans involved with the justice system.

## 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.

- The Trust assisted Mountain Resource Center Inc. in Colorado to provide housing, utilities, mental health assistance, emergency support, health care costs, job training, car repairs and costs associated with special events for veterans and their families.
- The Trust provided funds to California-based Orange County Rescue Mission Inc. to support its Tustin Veterans Outpost in providing transitional housing and supportive services to veterans and their families experiencing homelessness.
- The Trust awarded funds to the Society of St. Vincent de Paul in Arizona for its transitional housing and support services through Ozanam Manor for older and ill and injured veterans who are experiencing homelessness.
- New Hampshire-based Harbor Homes Inc., doing business as Harbor Care, received Trust support through a grant for its Homeless Veteran Reintegration Program to provide necessary items to eliminate the barriers homeless veterans face in attaining employment.

## GRANT SPOTLIGHT

### ADAPTIVE SPORTS & OUTDOOR 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.



**D**avid Hart, founder of the Ohio-based Blue Skies For The Good Guys And Gals Warrior Foundation, knows that for some, the path to healing may start with jumping out of an airplane or soaring through a tree canopy on a zip line.

That's why for the past 11 years, Blue Skies has hosted its Warrior Weekend to Remember with the mission of bonding, healing and enriching the lives of combat-injured veterans and families of fallen heroes.

Hart said the activities hosted throughout the weekend are designed to create common ground and shared experiences that help break the barriers and challenges of meeting people and talking through difficult topics.

"I think it taps right into the warrior heart," he said. "I think it's that part of you that has been pushed to do things that were extraordinary in your military career."

The weekend nights close with time around a "bond" fire to allow participants and program mentors to reflect on their time and develop deeper connections. Mentors are alumni from previous Warrior Weekends whose role is to facilitate participants letting their guard down and opening up to others.

Funds from the Trust support this event so participants can attend at no cost.

"We couldn't do it without [the Trust]," said Hart. "We're just very grateful for that support. It allows us to continue our mission."

Veterans and family members of fallen warriors who participate in Blue Skies Warrior Weekend to Remember events bond over the shared experience of adventure-rich activities. These events are meant to break down barriers to enrich deeper conversations and community around difficult conversations.

- The National Military Family Association, based in Virginia, received support from the Trust for its Operation Purple Camp, which provides outdoor sleepaway camps to children of ill and injured veterans.
- The Trust awarded funds to Project Healing Waters Fly Fishing Inc., based in Maryland, for its therapeutic fly-fishing programs and outings for ill and injured veterans.
- The Trust awarded funds to Georgia-based Team Red, White & Blue Inc. to provide physical fitness activities for veterans through its Eagle Expeditions.



## 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 a large number of veterans experiencing homelessness, a companion animal is an emotional support and one of the few constants in their lives. “We’ve heard it time and time again that a pet has prevented them from committing suicide,” said Genevieve Frederick, founder and president of Feeding Pets of the Homeless, based in Nevada.

She said nearly 25% of people experiencing homelessness have pets, which can provide companionship and protection while fostering a sense of responsibility.

“That animal is part of that person’s family,” said Frederick. “They will feed that pet before they feed themselves.”

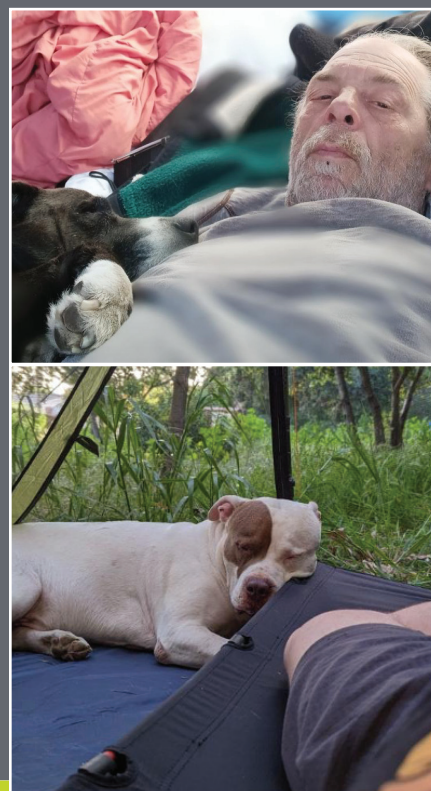
But often, people experiencing homelessness don’t have the money or ability to provide basic veterinary care, such as vaccines, to their animal. For veterans, this can be a barrier to entering into Department of Veterans Affairs-supported homeless programs.

Through a memorandum of understanding with the VA, Feeding Pets of the Homeless provides the funding for basic veterinary care to pets of veterans experiencing homelessness. Funds from the Trust supported these efforts.

In 2023, they assisted 262 animals of veterans.

Frederick said her organization is committed to helping as many pets as they can, despite skyrocketing veterinary costs, some by as much as 42% over the past year—an amount she attributes to inflation.

“[The Trust] helps us tremendously,” she said.



**Top:** A veteran experiencing homelessness rests with his dog, Joe, in a tent off a river in Philadelphia. The veteran found Feeding Pets of the Homeless through the VA and contacted the organization for help with his pet’s medical concerns. **Bottom:** Zeus, a pit bull, sits with his owner, a disabled veteran who lives in a tent in Placentia, California. Feeding Pets of the Homeless helped with veterinarian bills after Zeus experienced a medical emergency.

- In Florida, K9s for Warriors Inc. received support for its pairing program to provide service dogs to ill and injured veterans.
- The Trust awarded funds to the California-based Lockwood Animal Rescue Center to support its Wolves and Warriors program in providing veterinarian training to veterans through the employment of a veteran veterinary technician.
- The Trust awarded funds to Canines For Service Inc. in North Carolina to assist with providing trained service dogs to ill and injured veterans.

## 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



When the Cincinnati Opera presented the world stage premiere of “The Knock,” an opera that highlights the tragic stories of military spouses being notified their loved one was killed in battle, leaders knew it would be a moving experience for audiences.

“[Opera] has a unique ability to achieve a level of emotional impact and storytelling that is just different from other art forms,” said Christopher Milligan, CEO of the Cincinnati Opera.

But he said his team felt there was also a deeper obligation to perform “The Knock.”

“We want those who were in service and see this, for their service and sacrifice to be validated and affirmed,” said Milligan.

Funds from the Trust helped bring the presentation to the stage in 2023 and allowed for facilitated after-show conversations between audience members and veterans.

“The discussion it provoked about the many costs of war, ones we do not always consider, is an important one to have,” wrote one attendee in an after-show questionnaire.

When opera highlights contemporary stories like this, Milligan said those reactions often spur audience members to take tangible actions. In the case of “The Knock,” that may include community service for veterans or support for a veteran neighbor. After-show interactions also helped the audience emotionally connect with an aspect of war most people don’t know about, helping bridge a civilian-military divide.

“To have this kind of impact is really fulfilling and, at the end of the day, where [DAV’s] and our mission overlap,” said Milligan. “It sounds a little crazy from the outside that an opera company would partner with an organization like DAV. But for us, it’s ended up as one of the most meaningful and powerful partnerships that we’ve done.”

Performers of the opera “The Knock” brought to stage the difficult moments of casualty officers informing families that their loved one was killed in battle. (Photos by Philip Groshong/Cincinnati Opera)

- The Trust provided funding for Tennessee-based CreatiVets to support ill and injured veterans’ participation in its therapeutic songwriting program.
- In Virginia, Armed Services Arts Partnership received funds from the Trust to provide arts programming to ill and injured veterans and their families through classes, workshops and performances.



## The Victories *concluded*

### 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.

#### GRANT SPOTLIGHT

Veterans who receive other than honorable discharges from service are often pushed out of the military when they are in a crisis related to trauma they experienced in service. When they file to upgrade their discharge, they're entering into a complicated process that requires considerable time and effort to win.

That's where attorney Christie Bhageloe, who is the director of the Discharge Upgrade Program at the Washington, D.C.-based Veterans Consortium Pro Bono Program, and her team come in.

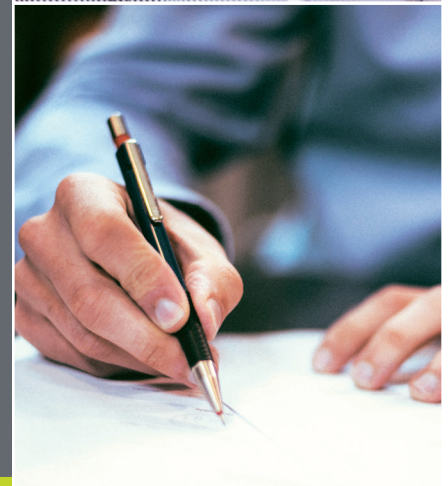
"The [review] boards really don't want to say yes," said Bhageloe. "The burden is completely on the veteran to prove that the military did the veteran wrong. That's what makes it so important to have an attorney on your side who has time."

She said her office receives between 700 and 1,000 calls a year from veterans seeking support. For those veterans who go through an intake review process and meet the eligibility criteria for the program, there's a 90% success rate getting upgrades approved. In 2023, attorneys supporting the Discharge Upgrade Program successfully argued 28 cases.

"For almost all the veterans, the big thing is not even the benefits—because they have been living without that for decades sometimes by the time they come to us—it's just restoring honor in their military service. It's a matter of pride," said Bhageloe. "It's truly life-changing for them to have that new DD-214."

The Trust is the sole sponsor of the Veterans Consortium's Discharge Upgrade Program, bringing this service to veterans at no cost.

"I am so grateful that [the Trust is] willing to sponsor this work," said Bhageloe. "Because, unlike VA disability benefits work, there are not a million attorneys out here doing this work. It's just a few nonprofits and attorneys who charge between \$7,000 to \$10,000 up front for the veteran to file an upgrade."



- Funds from the Trust helped the veterans legal team at Community Legal Aid Services Inc., based in Ohio, provide free legal assistance to veterans.
- In Massachusetts, the President and Fellows of Harvard College received Trust support to provide ill and injured veterans with legal assistance through the services of students and staff of the Veterans Legal Clinic. This included general costs needed to conduct the clinic and support for the DAV Distinguished Speaker Series.

# 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.



- 98.7% Total program services
- 0.8% Management and general
- 0.5% Fundraising





# 2023 Financials

## SUPPORT AND REVENUE

### Support

Contributions—Without Donor Restrictions	\$7,297,980
Contributions—With Donor Restrictions	\$1,179,972
Contributions of Charitable Gift Annuities	\$251,270
Bequests	\$9,958,371

<b>Total Support</b>	<b>\$18,687,593</b>
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### Revenue

Interest and Dividends Income—Net	\$1,661,986
Gain (Loss) on Sale of Investment Securities	(\$601,723)

<b>Total Revenue</b>	<b>\$1,060,263</b>
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<b>TOTAL SUPPORT AND REVENUE</b>	<b>\$19,747,856</b>
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## EXPENSES

<b>Program Services</b>	<b>\$21,579,244</b>
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### Supporting Services

Management and General	\$168,817
Fundraising	\$112,106

<b>TOTAL EXPENSES</b>	<b>\$21,860,167</b>
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<b>Excess of Support and Revenue Over Expenses</b>	<b>(\$2,112,311)</b>
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Change in Unrealized Appreciation of Investments	\$7,357,784
Charitable Gift Annuity Valuation Adjustment	\$65,453

## NET ASSETS

<b>Change in Net Assets</b>	<b>\$5,310,926</b>
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Net Assets—Beginning of Year	\$53,021,449
Net Assets—End of Year	\$58,332,375

<b>Total Without Donor Restrictions</b>	<b>\$58,312,875</b>
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<b>Total With Donor Restrictions</b>	<b>\$19,500</b>
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<b>TOTAL NET ASSETS—End of Year</b>	<b>\$58,332,375</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

## PRESIDENT

**Richard E. Marbes**

Wisconsin

## DIRECTOR

**Nancy G. Espinosa**

Utah

## DIRECTOR

**J. Marc Burgess**

Kentucky

## VICE PRESIDENT

**Barry A. Jesinoski**

Kentucky

## DIRECTOR

**Danny D. Oliver**

Oklahoma

## SECRETARY/TREASURER

**Dennis R. Nixon**

Texas

## DIRECTOR

**Denice T. Williams**

Virginia

## ADMINISTRATOR

**Bridgette G. Sorrell**

DAV National Headquarters  
Erlanger, Kentucky

## 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).

Since first being evaluated by Charity Navigator in 2002, the DAV Charitable Service Trust has continually received the coveted 4-star rating and has earned multiple 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 2023 Platinum Seal of Transparency from GuideStar by Candid.









**DAV CHARITABLE SERVICE TRUST**

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**[cst.dav.org](http://cst.dav.org)**

This report is available online  
at [cst.dav.org/resources](http://cst.dav.org/resources).