

2020 ANNUAL REPORT



Charitable Service Trust



On Cover: More than 60 members of the Kentucky Air National Guard's 123rd Airlift Wing are reunited with friends and family as they return to their home base in Louisville, Kentucky. (Photo by Master Sgt. Phil Speck/Air National Guard)



Charitable Service Trust

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Dear Caring Friend,

Thank you, first and foremost, for being a part of the DAV Charitable Service Trust and supporting our efforts to ensure victories for veterans. Our mission to give back to the men and women who have bravely served and sacrificed for our nation would not be possible without you and your generosity.

Like the rest of the world, we faced unprecedented challenges this year due to the COVID-19 pandemic. Many of the things we could not have imagined at the start of 2020 now seem almost normal in 2021.

Despite the uncertainties, because of your help we were still able to assist America's heroes in regaining the confidence and quality of life they deserve. The Trust supported a wide range of special initiatives designed to promote mental, physical and emotional well-being for veterans and their families. We can be proud of our work alongside our partners that prevented so many in need from slipping through the cracks.

Veterans from all eras are able to pursue the American dream they fought to protect because of these programs—whether it's overcoming homelessness, physical barriers, unemployment or the emotional injuries that often come with wartime service.

As new generations return from war in need of our assistance, we stand poised and ready to help them make the most of life's opportunities. And as we've learned from the past year, we are prepared to adapt and overcome as needed to continue our mission of service.

As a veteran and amputee who lost a leg in service, I can tell you with great confidence how important families and communities are in helping veterans regain their sense of dignity, purpose and belonging after an injury. Your support of the Trust makes you a stakeholder in our work to renew lives.

Your gift plays an important role in keeping the sacred promise we made to those called to serve in harm's way. And your support ensures the programs highlighted throughout this report are in place to facilitate victories for veterans.

Thank you,

A handwritten signature in black ink that reads 'Richard E. Marbes'. The signature is written in a cursive, flowing style.

Richard E. Marbes
President





THE MISSION OF THE DAV CHARITABLE SERVICE 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 homeless veterans, and addresses the needs of veterans returning from recent combat service.



Navy Senior Chief Petty Officer Chad Sweetser hugs his children after returning home to Naval Air Station Whidbey Island, Washington. (Photo by Petty Officer 3rd Class Caleb Cooper/Navy)

VICTORIES FOR VETERANS

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 Trust support address the wide range of physical and psychological barriers that affect a veteran's quality of life. The Trust identifies and supports initiatives that enhance research and mobility for veterans who've lost limbs or suffered spinal cord injuries, help our aging veterans enjoy a sense of dignity and peace, provide shelter to homeless veterans 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 those wounded of all generations, with a particular focus on recent-war veterans and a goal to help succeeding generations confront and overcome the barriers caused by war's wounds so they can make the most of their lives following trauma.

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 receive in uniform vanish 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 of all eras 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 veterans of recent wars, many of whom have endured several combat deployments as our nation has waged war on multiple 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.

Historically, funds have been awarded to support:

- Programs ensuring quality health care for veterans.
- Assistance to veterans suffering from 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 afflictions.
- 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 homeless or at-risk veterans and their families.
- 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.
- 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, ill and injured 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 impact the Trust makes in the lives of the community it serves. We are grateful to those dedicated patriots who serve and volunteer to deliver 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" from Charity Navigator and received its second consecutive perfect score rating. Since first being evaluated in 2002, the Trust has received four stars 16 times. 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.



DAV Charitable Service Trust

IN 2020

grants totaling
\$7.2 million
were awarded throughout
the United States.

More than **95 cents** out of every
donated **dollar** directly supports programs
that help veterans and their families.

The Trust supports
REHABILITATION
CRISIS INTERVENTION
HEALTH CARE
EMPLOYMENT
EDUCATION
CAREGIVERS
& FAMILIES
RECREATION

 **CHARITY NAVIGATOR**
Four Star Charity

In 2020, the Trust received its second
perfect score rating from Charity Navigator.

CFC #11322



Ce-Ce Mazyck

**MY VICTORY WAS
FINISHING MY EDUCATION.**

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 enjoyed tremendous assistance from various companies who recognize and contribute to our cause. Specifically, the Trust extends appreciation to Ford Motor Co., Walt Disney Co., The Wild Flower Foundation, Inc., The Nardslico Donor Advised Fund, Alice F. & Cortland J. Knipe Charitable Trust, Prudential Financial, AJ & MD Richards Foundation, Milton & Fannie Brown Family Foundation, William C. Collignon Family Foundation, DV FT Holdings LLC, Myer Family Charitable Foundation, Kenneth W. Scott Foundation, Cranaleith Foundation, and many other corporations and foundations that supported the Trust so graciously in 2020.



The PALS for Patriots Program serves military service members who have suffered serious service-connected injuries. The program transports them to specialized military medical centers and to morale-boosting events.

The Victories Enhanced Quality of Life

Veterans can sometimes face unforeseen consequences to the intangibles of life 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 Trust has dedicated itself to helping entities provide services that substantively improve veterans' quality of life.

- Funds from the Trust helped NewView Oklahoma support the Veteran Independence Through Adaptive Living (VITAL) Program by providing low-vision rehabilitation, neurotherapy and support group services to visually impaired veterans.
- The Trust granted funds to Hope For The Warriors to support the Drive for Hope program in providing adaptive-driving education and training, vehicle modification and auto adaptive equipment installment to ill and injured veterans nationwide.
- Through the PALS for Patriots program, funds from the Trust assisted Patient AirLift Services (PALS) in providing air transportation to medical treatments for heroes in need.



Hope For The Warriors' Drive for Hope program is designed to help service members and veterans regain the independence that was lost as a result of a catastrophic injury.



The Trust supports many organizations that devote their time and resources to veterans struggling to find reliable housing and employment.

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.

- In Connecticut, the Trust awarded funds to Applied Behavioral Rehabilitation Institute Inc. to serve nutritious meals to homeless veterans through Homes For The Brave and Female Soldiers: Forgotten Heroes programs.
- Funds from the Trust helped One80 Place provide counseling, employment and educational services for homeless or at-risk veterans.
- A Trust grant helped Catholic Charities New Hampshire support its Liberty House program in providing housing and supportive services to veterans recovering from substance abuse.
- Funds from the Trust helped CASA conduct direct housing assistance to ill and injured veterans through the Supportive Housing Program for Veterans.
- Through the VetNet—A Safety Net for Veterans program, funds from the Trust helped California-based Working Wardrobes for a New Start provide employment services to ill and injured veterans and their spouses.

MY VICTORY IS REMOVING 'CAN'T' FROM MY VOCABULARY.

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 champion within are critically important steps toward recovery.

- Funds from the Trust helped Disabled Sports USA provide adaptive fitness equipment to ill and injured veterans across the country for usage at their homes.
- The Trust granted funds to Idaho-based Higher Ground Sun Valley Inc., which helps the Higher Ground Veteran Program in providing snow sports activities to veterans, their families and supporters nationwide.

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.

- The Trust granted funds to Maryland-based Warrior Canine Connection Inc. to help the Mission Based Trauma Recovery program in providing animal-assisted therapy and trained service dogs to ill and injured veterans.
- In Florida, funds from the Trust assisted Island Dolphin Care Inc. in providing scholarships that allow ill and injured veterans to receive therapeutic and educational dolphin-assisted services.



The Veterans Alternative Accelerated Wellness Program is an intensive five-day program model that provides veterans with alternative therapies not traditionally offered through the VA.



National Center of Excellence for Complex Post Traumatic Stress. (Courtesy of Keiser Design Group)

Save A Warrior provides an alternative, warrior-led, holistic service that equips veterans, military personnel, police, firefighters and other first responders with a community of support and effective techniques to overcome the symptoms associated with post-traumatic stress and suicidal ideations. (Photos courtesy of Save A Warrior)



The Veterans Alternative Accelerated Wellness Program is centered around fostering key concepts such as post-traumatic growth and camaraderie.

Creative Healing

Veterans are ingrained with a sense of selflessness. Their humility and focus on the team over the individual make any form of self-glorification unthinkable. But after experiencing the trauma that comes with wartime service, the ability to express oneself 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.

- The Trust granted funds to the Warrior Meditation Foundation's national Save A Warrior program by supporting the National Center of Excellence for Complex Post-Traumatic Stress, which will provide a healing outlet for ill and injured veterans combating suicide and mental health issues.
- In Illinois, funds from the Trust went to Thresholds to support the Veterans Project by providing trauma therapy, case management and holistic treatment services to veterans experiencing mental illness.
- Funds from the Trust helped Blue Skies For The Good Guys And Gals Warrior Foundation support the Warrior Weekend to Remember and various other reunion events throughout the year for veterans combating isolation and suicide.
- The Trust assisted Florida-based Veterans Alternative Inc. to deliver five-day therapy and wellness activities to ill and injured veterans through the Accelerated Wellness Program.



Legal Assistance

Veterans sometimes may be forced to fight the justice system to obtain the benefits they've earned through service. The Trust proudly supports numerous organizations dedicated to providing legal assistance when necessary.

- In New York, the Trust awarded funds to the New York Legal Assistance Group's LegalHealth Division to help deliver free legal services to veterans at VA medical facilities throughout the New York City area.
- In Texas, funds from the Trust assisted Mental Health America of Greater Houston Inc., helping the Veterans Behavioral Health Program provide service-related mental and behavioral health needs to veterans involved with the justice system.
- The Trust granted funds to Community Legal Aid Services Inc., based in Ohio, to support the Veterans Legal Team in providing free legal assistance to disabled veterans.

A Triumph for the Bold

The 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.

Support & Revenue

Support

Contributions—Without Donor Restrictions	\$ 7,876,921
Contributions—With Donor Restrictions	\$ 731,042
Contributions of Charitable Gift Annuities	\$ 261,662
Bequests.	\$ 776,248
Total Support	\$ 9,645,873

Revenue

Interest & Dividend Income—Net	\$ 621,256
Gain (Loss) on Sale of Investment Securities	\$ 382,399
Total Revenue	\$ 1,003,655

Total Support & Revenue **\$ 10,649,528**

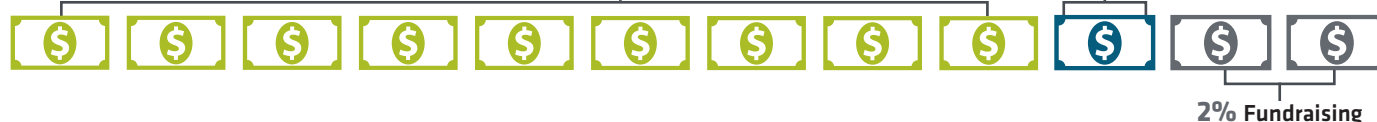
Expenses

Program Services	\$ 7,310,192	(97%)
Management & General.	\$ 96,506	(1%)
Fundraising	\$ 131,547	(2%)
Total Expenses.	\$ 7,538,245	

Percentage of Total Expenses

97% Program Services

1% Management & General Expenses



Excess of Support & Revenue Over Expenses	\$ 3,111,283
Change in Net Unrealized Appreciation of Investments	\$ 2,505,507
Charitable Gift Annuity Valuation Adjustment	\$ (166,409)

Net Assets

Change in Net Assets	\$ 5,450,381
Net Assets—Beginning of Year.	\$ 34,132,819
Net Assets—End of Year	\$ 39,583,200
Total Without Donor Restrictions.	\$ 39,522,200
Total With Donor Restrictions	\$ 61,000
Total Net Assets—End of Year	\$ 39,583,200

The complete financial statements have been audited and received an unqualified opinion. A copy of the audited statement is available upon request.

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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).



In 2020, the DAV Charitable Service Trust received the coveted 4-star rating and a perfect overall score from Charity Navigator, marking the 16th time the Trust has received a 4-star rating since first being evaluated in 2002 and the second consecutive perfect score. 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 2020 Platinum Seal of Transparency from GuideStar by Candid.



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