

# 2021

## ANNUAL REPORT



Charitable Service Trust



**On Cover:** *An airman from the 193rd Special Operations Wing embraces his family in Middletown, Pennsylvania, after returning home from an overseas deployment. (Photo by Staff Sgt. Tony Harp/Air National Guard)*



# Charitable Service Trust

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Dear Caring Friend,

I offer my sincerest thanks for your support of the DAV Charitable Service Trust this past year. It's because of your generosity that we can carry out our mission to enable veteran-focused, nonprofit organizations' support of our nation's heroes.

Even in these times of great uncertainty, the important work of these organizations doesn't stop. Collectively, you—our donors—recognize this and have increasingly and abundantly given to make sure ill and injured veterans and their families have access to resources and programs that meet their needs.

As you look through this report, you'll see the fruits of your gifts. You've touched the lives of veterans recovering from homelessness. You've helped fund programs that provide job and skills training for veterans seeking work in the trades. Your financial support provided veterans and their families access to long-term therapeutic care and supportive services. Veterans experiencing food insecurity had meals to eat because of your donations.

We may never hear all the stories of hope, help and healing made possible because of the Trust's community of donors. But what's emerged over the past 35 years we've existed is that you, like the very veterans you support, are resilient and committed. They've defended our way of life, and you place a high value on that sacrifice.

Each generation has veterans who must overcome challenges brought about by their time in uniform. You make the uncertainty that comes when dealing with illness and injury easier on them by letting them know there's a robust network of support ready to meet their needs.

The Trust exists to empower veterans to lead high-quality lives with respect and dignity. We couldn't do this without each of you. I hope this report brings you joy as you see the victories of the programs, organizations and veterans you've helped and will continue to help.

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







PHOTO BY AIRMAN 1ST CLASS CHRISTI RICHTER/AIR NATIONAL GUARD

# 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.





Recruits of Platoon 1022, Company C, 1st Recruit Training Battalion, stand in formation during their initial drill evaluation at Marine Corps Recruit Depot Parris Island. (Photo by Cpl. Octavia Davis/Marine Corps)

## VICTORIES FOR VETERANS

Our nation's heroes leave nothing to chance when it comes to defending the 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 the wide range of physical and psychological barriers that 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 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 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 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 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.

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 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 impact 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 two perfect score ratings from Charity Navigator. 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.

**DDAV** Charitable Service Trust

IN 2021

grants totaling

**\$6.6 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**



The Trust has received two perfect score ratings from Charity Navigator.

CFC #11322

A photograph of Armando Albarran, a man with dark hair, wearing a red polo shirt and khaki pants, sitting in a wheelchair. He is in a living room with a black leather sofa to his left and a wall covered in many framed certificates or awards behind him. A window with blinds is visible in the background to the right. The text "MY VICTORY WAS OVERCOMING MY COMBAT INJURIES AND HAVING A FULL LIFE." is overlaid in large, white, bold, sans-serif capital letters across the center of the image.

**MY VICTORY WAS  
OVERCOMING MY COMBAT  
INJURIES AND HAVING  
A FULL LIFE.**

## 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 Becket Family Foundation, Alice F. & Cortland J. Knipe Charitable Trust, The Goldie Anna Charitable Trust, Smithers Patriot 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 2021.





Through A Sanctuary for Military Families Inc., families attend six-day therapeutic retreats at locations like Epworth by the Sea in St. Simons, Georgia. There, they participate in activities designed to reenforce the skills learned in carefully crafted workshops focusing on relationships, family matters, financial health and post traumatic growth.

## The Victories

### Enhanced Quality of Life

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

- Food & Friends received funds from the Trust for its Specialized Nutrition Service Program, which provides home-delivered meals, groceries on the go, and nutrition counseling and education to veterans with critical illnesses in the greater Washington, D.C., area.
- The Trust provided funds to A Sanctuary for Military Families Inc. for its long-term therapeutic program designed to address suicide, homelessness and unemployment for veterans and their family members nationwide.
- Funds from the Trust helped Bastion Community of Resilience's efforts in Louisiana to support the employment costs of licensed professionals who conduct the Residential and Headway programs in providing housing, therapeutic activities and supportive services to veterans and their families.
- In Georgia, Decatur Cooperative Ministry received funds from the Trust for their Project Take Charge program, which provides food and supportive resources to at-risk veterans.
- In South Carolina, funds from the Trust supported Senior Resources Inc.'s participation in the Meals on Wheels program to provide nutritional meals and social interaction to ill and injured veterans.
- The Trust assisted the Yellow Ribbon Fund's Crossroads Program, which provides furnished apartments to veteran patients and their families during treatment at Walter Reed National Medical Center.



With help from the DAV Charitable Service Trust, Food & Friends helps address food insecurity for veterans near the nation's capital.

Mike Biggs



**MY VICTORY WAS GETTING OFF  
THE STREETS AND MAKING  
THINGS RIGHT WITH MY FAMILY.**

### 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 Missouri, the Trust assisted Welcome Home Inc. with providing housing assistance and supportive services to veterans who are homeless or at risk of homelessness.
- In Texas, funds from the Trust assisted Citizens Development Center's Operation Employment Program in delivering transportation services and forklift training to veterans seeking employment.
- In California, the Trust assisted Swords to Plowshares, which provides short-term emergency housing through their Emergency Housing Program for veterans and their families who are homeless.





Outdoor recreational therapy—like that offered by Outward Bound—has proven to be an effective healing tool for injured and ill veterans.

## 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.

- Outward Bound received funds from the Trust for scholarships to ill and injured veterans who participate in wilderness courses as part of the Outward Bound for Veterans program.
- In California, the Trust granted funds for California Aquatic Therapy & Wellness Center Inc. to provide aquatic therapy to ill and injured veterans.
- The Trust awarded funds for Our Military Kids, which offers scholarships to children of ill and injured service members for participation in extracurricular activities.



A scholarship recipient from Our Military Kids offers an expression of gratitude for the taekwondo lessons she received.



# 2021 RECORDS OF ACHIEVEMENT



Retired Army Chief Warrant Officer 2 Rebecca Mann, of Plymouth, Massachusetts, with service dog Sully from NEADS. (Photo by Tracy Kelly)



Therapeutic riding is an excellent form of exercise therapy that is fun, safe, challenging and socially rewarding. Lesson plans at Quantum Leap Farm are tailored individually to address veterans' and their families' needs.

## 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.

- Got Your Six Support Dog received financial support from the Trust to help provide trained service dogs to ill and injured veterans in Illinois and Missouri.
- The Trust provided funding to NEADS Inc. to help its efforts in securing trained service dogs through the Service Dogs for Veterans program.
- Quantum Leap Farm Inc. in Odessa, Florida, received Trust support for its equine-assisted therapy programming, weekend retreats and recreational opportunities for ill and injured military personnel, veterans and their families.

## 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.

- The Trust provided funds for Operation Honor Corp. to support job training, volunteer opportunities, equipment and events in the woodworking trades for ill and injured veterans in Kentucky, Indiana and Ohio.
- The Trust assisted the Music Conservatory of Westchester's Healing Our Heroes program, which provides music therapy services to ill and injured veterans in Connecticut, New Jersey and New York.
- Musicians On Call Inc. received funds from the Trust to support its Bedside Performance Program in providing hospitalized veterans with live and virtual music.
- The Trust granted funds to Veteran Tickets Foundation to purchase educational and family event tickets for ill and injured veterans throughout the country.



At Operation Honor Corps, each Patriot Cross is handcrafted with honor and respect by veteran craftsmen.

# 2021 RECORDS OF ACHIEVEMENT



With the Trust's support, the University of Cincinnati Foundation is helping student veterans fund their education.

## 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.

- Legal Aid of Southeastern Pennsylvania received Trust funds to support its Veterans Advocacy Project efforts that provide legal assistance to ill and injured veterans.
- The Trust granted funds to Veterans Education Success to help employ two attorneys who provide free legal assistance to veteran students experiencing issues with utilizing their education benefits.
- Sentinels of Freedom Scholarship Foundation received funds from the Trust to provide housing subsidies, financial coaching, mentoring and transition services to ill and injured veterans pursuing higher education.
- The University of Cincinnati Foundation received funding support from the Trust to provide scholarships to veteran students through its Veteran Student Affairs office.

## 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.

# 2021 FINANCIALS

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## Support & Revenue

### Support

|  |                      |
|--|----------------------|
| Contributions Without Donor Restrictions . . . . .   | \$ 11,008,974        |
| Contributions With Donor Restrictions . . . . .      | \$ 1,080,937         |
| Contributions of Charitable Gift Annuities . . . . . | \$ 291,151           |
| Bequests . . . . .                                   | \$ 1,899,891         |
| <b>Total Support . . . . .</b>                       | <b>\$ 14,280,953</b> |

### Revenue

|  |                     |
|--|---------------------|
| Interest & Dividend Income—Net . . . . .               | \$ 1,276,902        |
| Gain (Loss) on Sale of Investment Securities . . . . . | \$ 5,451,562        |
| <b>Total Revenue . . . . .</b>                         | <b>\$ 6,728,464</b> |

|  |                      |
|--|----------------------|
| <b>Total Support &amp; Revenue . . . . .</b> | <b>\$ 21,009,417</b> |
|--|----------------------|

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## Expenses

|                                 |                     |       |
|---------------------------------|---------------------|-------|
| Program Services . . . . .      | \$ 6,755,004        | (96%) |
| Management & General . . . . .  | \$ 195,887          | (3%)  |
| Fundraising . . . . .           | \$ 84,136           | (1%)  |
| <b>Total Expenses . . . . .</b> | <b>\$ 7,035,027</b> |       |

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|  |                      |
|--|----------------------|
| <b>Excess of Support &amp; Revenue Over Expenses . . . . .</b> | <b>\$ 13,974,390</b> |
| Change in Net Unrealized Appreciation of Investments . . . . . | \$ (1,427,995)       |
| Charitable Gift Annuity Valuation Adjustment . . . . .         | \$ 392,100           |

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## Net Assets

|   |                      |
|---|----------------------|
| <b>Change in Net Assets . . . . .</b>             | <b>\$ 12,938,495</b> |
| Net Assets—Beginning of Year . . . . .            | \$ 39,583,200        |
| Net Assets—End of Year . . . . .                  | \$ 52,521,695        |
| <b>Total Without Donor Restrictions . . . . .</b> | <b>\$ 52,502,695</b> |
| <b>Total With Donor Restrictions . . . . .</b>    | <b>\$ 19,000</b>     |
| <b>Total Net Assets—End of Year . . . . .</b>     | <b>\$ 52,521,695</b> |

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



# GOVERNING BOARD

## Officers

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### **PRESIDENT**

**Richard E. Marbes**  
Wisconsin

### **VICE PRESIDENT**

**J. Marc Burgess**  
Kentucky

### **SECRETARY | TREASURER**

**David L. Tannenbaum**  
Florida

## Directors

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**Andrew H. Marshall**  
Florida

**Danny D. Oliver**  
Oklahoma

**Denice T. Williams**  
Virginia

**Dennis R. Nixon**  
Texas

## Administration

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### **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).



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 2021 Platinum Seal of Transparency from GuideStar by Candid.



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