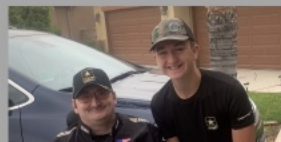


Trust and Foundation Administration



Trust and Foundation Administration



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House Inc.

e Service Trust

3 - December 31, 2023

ue: \$27.3 million

ce Giving Campaigns: \$1.1 million

1 Appropriations (Grants) to
Charitable Programs: \$21.5 million

Net Assets: \$58.3 million



Columbia Trust Grant Cycle

General Grant Application

- Applications are accepted during the period of April 1 - May 31 for the period for the annual grant.
- Budgeted Annual Requested (up to \$150,000) for the prior membership year.
- Example: 2023-24 membership year - \$125,000 approved APR.

Transfer/Relief Request Review Request

- Applications are accepted during the period of April 1 - May 31 for the period for the annual grant.
- Check out our website for helpful tips on how to complete the application.

What does the Columbia Trust Grant Program typically fund?

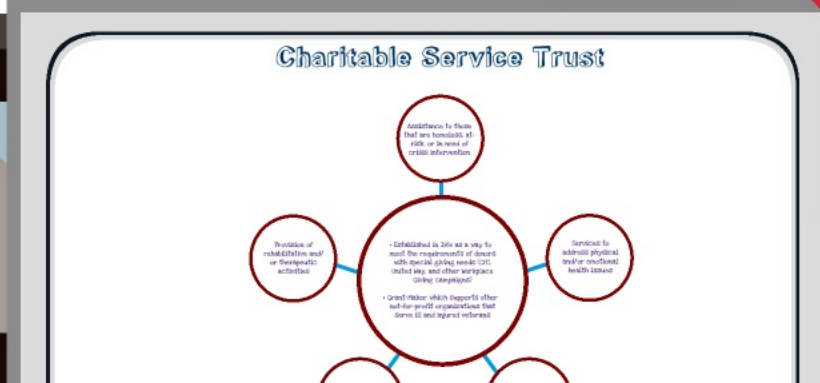
General Requests

- Salaries for VETS and DODS
- Homeless Veteran (and) Deceased
- Other direct service initiatives for veterans and/or their families

Transportation Program

What does the Columbia Trust Grant Program not typically fund?

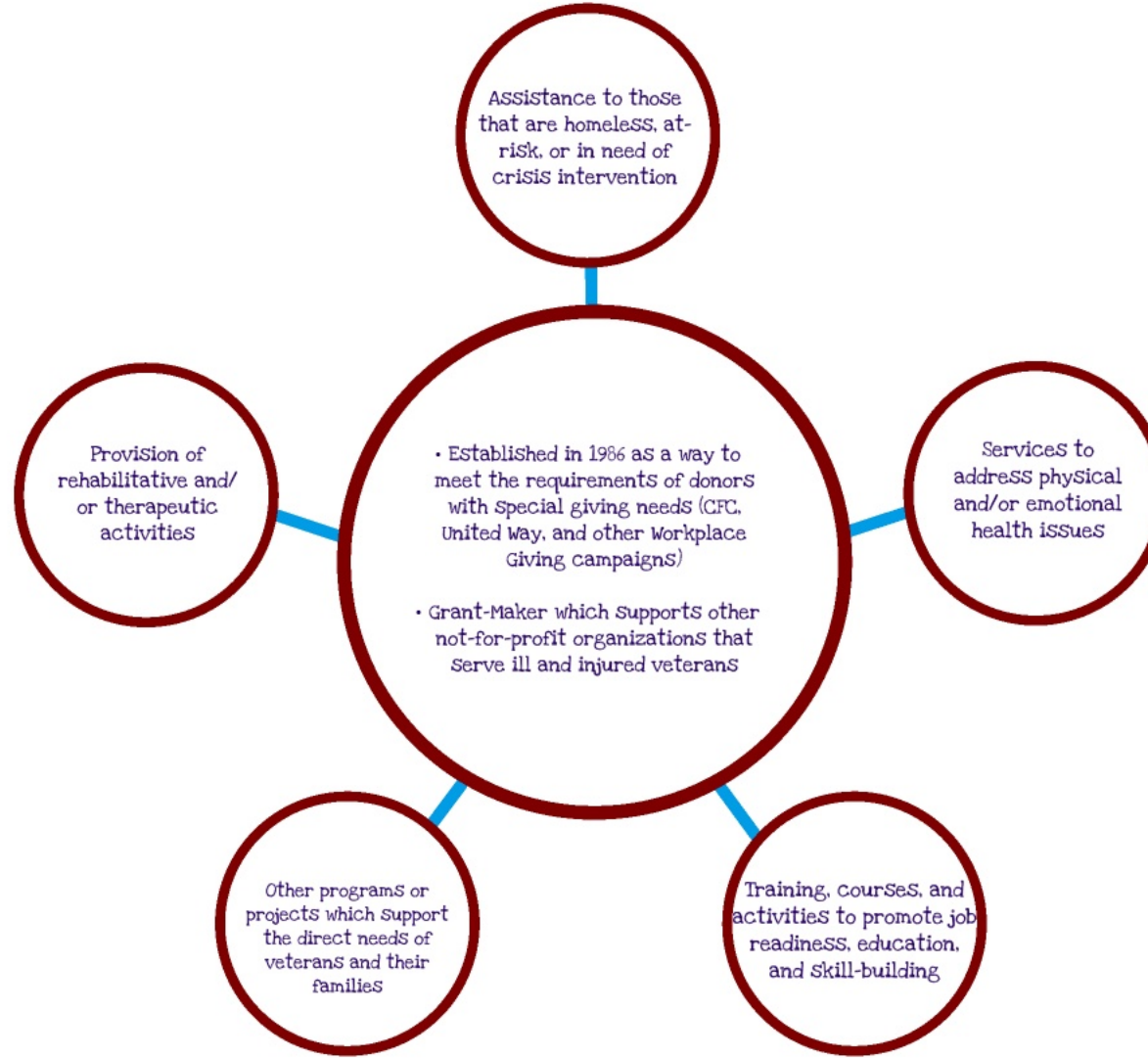
- Salaries for Commanders, Adjutants & other support staff
- Utilities and/or maintenance
- Office supplies
- Indirect costs
- Requests outside of the application period



Any Questions?

Charitable Service Trust


Charitable Service Trust




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tative and/
rapeutic
ivities

- Established in 1986 as a way to meet the requirements of donors with special giving needs (CFC, United Way, and other Workplace Giving campaigns)
- Grant-Maker which supports other not-for-profit organizations that serve ill and injured veterans


Service
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and/or em
health is



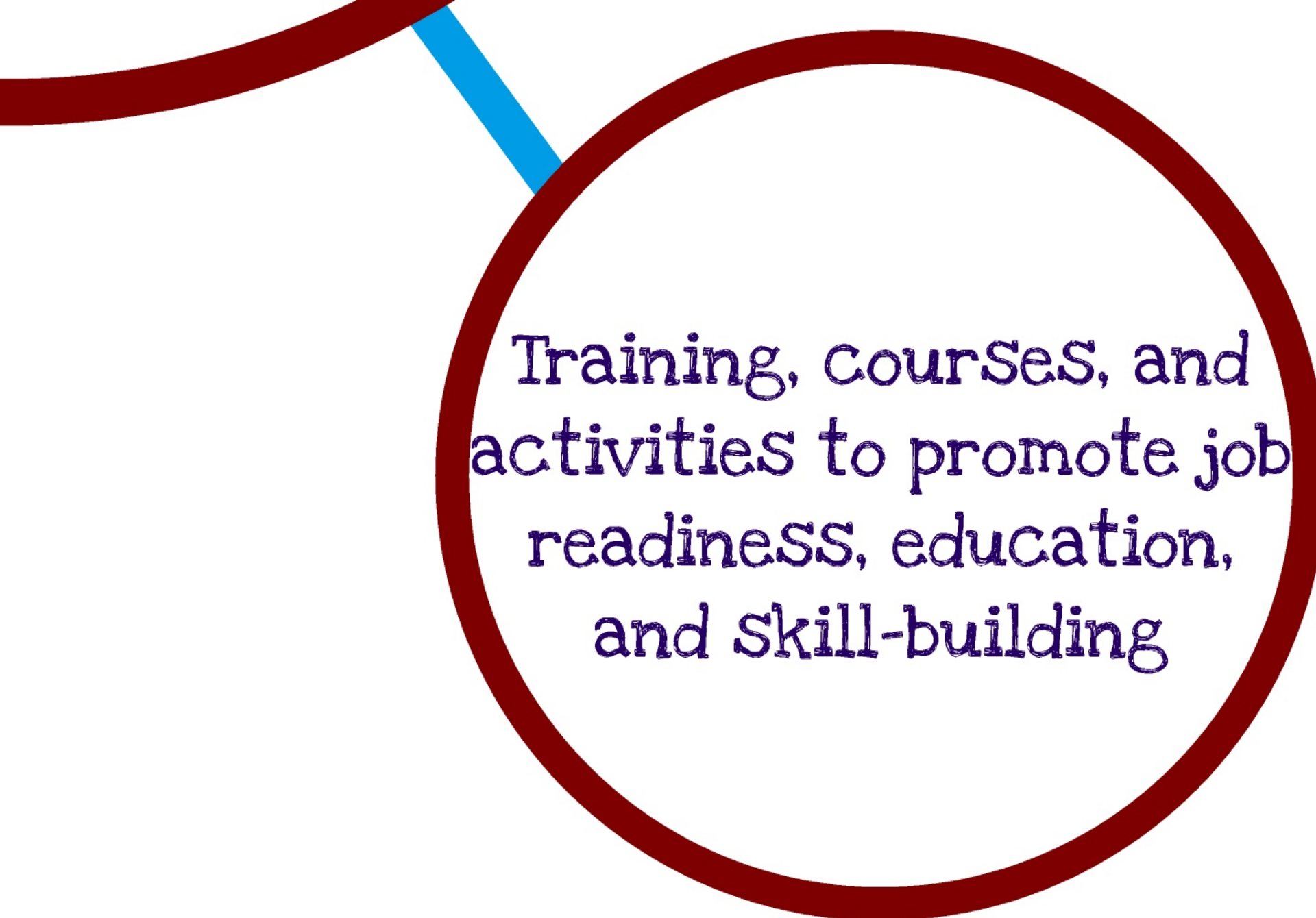
Assistance to those
that are homeless, at-
risk, or in need of
crisis intervention



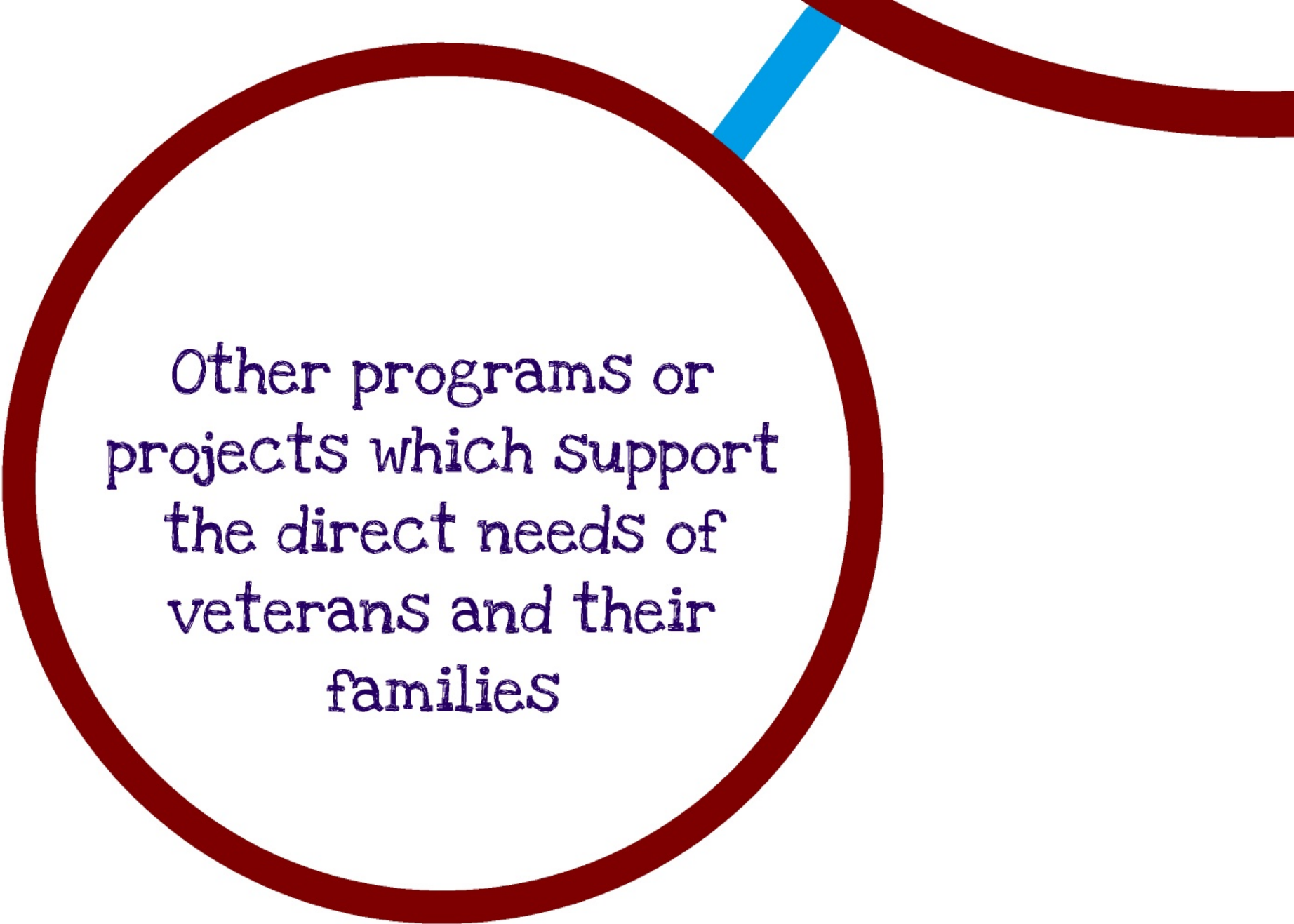
ProviSion of
rehabilitative and/
or therapeutic
activities



Services to
address physical
and/or emotional
health issues



Training, courses, and
activities to promote job
readiness, education,
and skill-building



Other programs or
projects which support
the direct needs of
veterans and their
families

What would the Trust not typically fund?

Building/Renovations

General Operating Expenses

Individuals

Pilot (Start-Up) Programs

JANUARY 1, 2023 - December 31, 2023

Total Revenue: \$27.3 million

Workplace Giving Campaigns: \$1.1 million

**Total Appropriations (Grants) to
Charitable Programs: \$21.5 million**

Net Assets: \$58.3 million

Program Services: 98.7%

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**National
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Foundation**

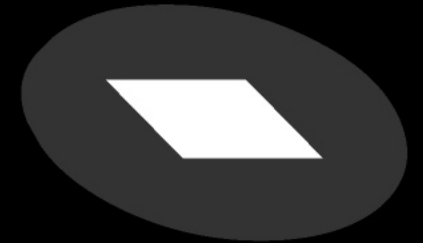
Columbia Trust

National Service Foundation

Established in 1986 to assist the DAV National Organization and its Departments/Chapters

Provides long-term financial stability to guarantee help for veterans in the future (similar to an endowment)

Primarily consists of long-term investment revenue



Columbia Trust

Established as a restricted Trust fund within the National Service Foundation in 1996

Provides a means for DAV departments and chapters to initiate or maintain Service programs at the local level

Allows for expansion in areas where unserved or underserved veterans reside

Those with financial stability are encouraged to contribute to the Trust to ensure that efforts continue for years to come

Departments and chapters in need of assistance to support their volunteer Service efforts may apply for a grant from the Columbia Trust

"TAKE A PENNY, LEAVE A PENNY"



Columbia Trust Grant Cycle

General Grant Applications

- Applications are accepted during the period of April 1 - July 15. (Be on the lookout for the annual memo)
- Required Annual Financial Reports (AFR) will be for the prior membership year.
 - Example: 2024-25 membership year = 2023-24 approved AFR

Transportation Network Vehicle Applications

- Application cycle will open in the last quarter of the year (be on the lookout for the annual memo)
- Check out our webinar for helpful tips:
dav.org/member-resources/webinars/

What a Grant

General

- Salary
- Honoraria
- Other expenses for family

Transportation

What does the Columbia Trust Grant Program typically fund?

General Requests

- Salaries for HSCS and DSOS
- Homeless Veteran Stand Downs
- Other direct service initiatives for veterans and/or their families

Transportation Program

Trust
fund?

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Downs

atives

What does the Columbia Trust
Grant Program not typically fund?

- Salaries for Commanders, Adjutants & other support staff
- Utilities and/or Maintenance
- Office Supplies
- Indirect costs
- Requests outside of the application period

Columbia Trust Transportation Network Grant Process



1

To access the online grant system as a first-time user, DAV department leaders (adjutants and commanders) must select "Request Password" to receive credentials and enter the email address used for your membership record.

2

Department leaders are required to apply on behalf of their chapter(s) but have the ability to request collaborators, specifically chapter leaders, to assist through the "Invitations" tab within the application.

3

Collaborators will receive an email with the link to register and login to access the application but will be unable to submit it. This process allows department leaders to control who can access the application(s) while also not being responsible for filling out the vehicle requests for the chapter(s).

4

Multiple vehicle requests can and will be requested within one application all under the department's record. Please do not submit the application until all vehicle requests on behalf of the department and associated chapters have been requested.

5

Previous year's annual financial report(s) (AFR) must be approved by DAV National Headquarters or uploaded if not required to file under provisions of the National Bylaws. → When a department is applying on behalf of its chapter, both department and chapter's AFRs are required if financial assistance is requested.

6

Detailed instructions on how to complete the vehicle grant are provided throughout the application.

Contact nsf@dav.org or 859-441-7300 ext. 3301 with any questions throughout the National Service Foundation Columbia Trust Transportation Network Vehicle grant application process.

Online portal: dav.smartsimple.com

DAV Transportation Network Grant Application Process Webinar: dav.org/member-resources/webinars/



Want to Know More?

Contact the T&FA department or check out the entity websites:

Charitable Service Trust: <http://cst.dav.org>

Disabled Veterans' Life Memorial Foundation: <http://avdlm.org>

National Service Foundation: <http://nsf.dav.org>

Departmental Staff

Supervisor

Jennie Stricker

Donation Specialist II

Natasha Baxter

Assistant to the Administrator

Daisy Miller

Grant & Donation Specialist

Joshua Adams

Trust & Foundation Admin. Specialist II

Beth Lambert



Any Questions?

Thank You!

Trust and Foundation Administration

