

COAST GUARD FOUNDATION

ANNUAL REPORT 2021



MESSAGE FROM SUSAN LUDWIG, PRESIDENT



SUSAN LUDWIG WITH ADMIRAL KARL SCHULTZ, COMMANDANT OF THE U.S. COAST GUARD.

In 2021 your Coast Guard Foundation continued to build toward a future where the brave men and women of the Coast Guard have the resources needed to be prepared for service, build resilience, and excel throughout their lives. We again leaned into our core areas of education and workforce development, morale and wellness support, and emergency assistance to provide comprehensive support for members, veterans, and their families.

We also partnered with the Coast Guard to address new and emerging needs. Because we understand the realities facing Coast Guard members, we expanded successful pilot programs that support mental resiliency for members, family resilience for couples, and enrichment for kids.

I am proud to report we continue to create a better future for the entire Coast Guard. From enlistment to long after retirement, with your help, Coast Guard members remain always ready. Families have complete support. And the Coast Guard continues to serve our Nation with distinction and the knowledge that their work is appreciated.

On behalf of the Coast Guard Foundation board and staff, and on behalf of the Coast Guard members we serve, thank you for your generosity and partnership. You are the Coast Guard Foundation.

A handwritten signature in blue ink that reads "Susan P. Ludwig".

Susan P. Ludwig
President, Coast Guard Foundation

34,641

DONATIONS FROM
57 U.S. STATES AND
TERRITORIES

19,478

INDIVIDUAL DONORS

1,087

ORGANIZATIONAL
PARTNERS

297

DONATIONS FROM
DAFS AND IRA
DISTRIBUTIONS

26%

INCREASE IN MEMBERS
OF OUR MONTHLY
DONOR SOCIETY, THE
LIGHTHOUSE KEEPERS

330

PROJECTS FUNDED
AT COAST GUARD
BASES NATIONWIDE

487

COAST GUARD
MEMBERS EDUCATED

1,082

GRANTS PROVIDED
TO SUPPORT COAST
GUARD FAMILIES

5,428

AMERICANS EDUCATED
IN BOATING SAFETY

COVER PHOTO:

A COAST GUARD PETTY OFFICER
TAKES THE OATH OF ENLISTMENT
DURING A RE-ENLISTMENT
CEREMONY ABOARD CGC
ANGELA MCSHAN AS THE U.S.
AIR FORCE THUNDERBIRDS FLY
OVER DURING THE ATLANTIC CITY
AIRSHOW IN AUGUST, 2021.

USCG PHOTO BY CPO MICHAEL PUTNAM

// 2021 FINANCIAL HIGHLIGHTS

WHERE THE DONATIONS CAME FROM



The Foundation uses a diversified revenue model that allows long-term growth of our support to the Coast Guard while mitigating the risk from a decrease in any one area. This was critical during the pandemic when event income was negatively impacted due to canceled events. As part of our 2017–2022 Strategic Plan, we are nearing completion of a human capital investment to grow our major gifts program, which will allow us to double our support to the Coast Guard in the next 10 years.

WHERE PROGRAM SUPPORT WENT

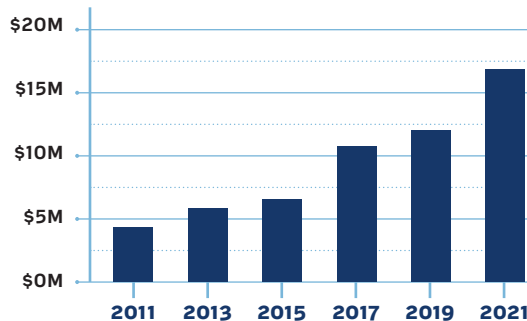


Direct program support includes projects funded for the Coast Guard, its members and their families. This graph does not include in-kind contributions and non-financial support provided to the Coast Guard community from Foundation assets and other resources. This chart does not include future pledges or endowment/investment revenue that were not available for use in 2021.

COAST GUARD FOUNDATION ENDOWMENTS

Endowment and investment accounts yield perpetual funding for Coast Guard members. By increasing this revenue source through endowed gifts and bequests, donors build long-term sustainability of Foundation programs. We are grateful to all who established endowments and bequests in the last year.

INVESTMENT PORTFOLIO BALANCE ▶



\$9.8M

DONATIONS AND PLEDGES RECEIVED

\$5M

FINANCIAL, DIRECT, AND IN-KIND SUPPORT PROVIDED TO THE COAST GUARD, ITS MEMBERS AND THEIR FAMILIES

\$1.6M

IN ENDOWMENTS AND INVESTMENTS FOR FUTURE SUPPORT

FULL FINANCIALS ▶ The Foundation's latest audited financials can be found online at coastguardfoundation.org/about-us/financials.

THANK YOU TO OUR DONORS ▶ This online edition of our annual report illustrates the impact of your support in 2021, and includes our Guardian's Circle and Munro Society membership and donor honor roll of gifts of \$5,000 or more. We thank you for your steadfast partnership and continued investment in Coast Guard members and families.

FAMILY RESILIENCE



WHEN HURRICANE IDA WROUGHT DEVASTATION FROM LOUISIANA TO NEW ENGLAND, THE COAST GUARD FOUNDATION RUSHED EMERGENCY AID TO THOSE COAST GUARD MEMBERS IMPACTED. IN THIS PHOTO, A COAST GUARD MARINE SCIENCE TECHNICIAN SEARCHES FOR POLLUTION DURING AN OVERFLIGHT IN LULING, LOUISIANA, ON SEPTEMBER 3, 2021. USCG PHOTO BY PETTY OFFICER 2ND CLASS RYAN DICKINSON



THE FOUNDATION HOSTED A HOLIDAY DINNER AT HONOLULU'S HALE KOA HOTEL FOR COAST GUARD FAMILIES DISPLACED FOR MONTHS BY CONTAMINATED WATER.

448 COAST GUARD FAMILIES ASSISTED WHEN THEY WERE MOST IN NEED

The Foundation ensures that families have the resources to recover from natural disasters, the death of a Coast Guard member, or other tragedies. We provided emergency grants to Coast Guard families who lost homes to Hurricanes Elsa and Ida, assisted with travel for families who lost their Coast Guard member to service, and partnered with Coast Guard leadership to bring holiday cheer to hundreds displaced from their homes in Hawaii due to contaminated water.

MORALE AND WELLNESS



COAST GUARD CUTTER *SEA DEVIL*, HOMEPORTED IN SILVERDALE, WASHINGTON, RECEIVED A MORALE GRANT TO FUND NEW BICYCLES AND INFLATABLE PADDLEBOARDS. "EVERYONE ON BOARD THE *SEA DEVIL* IS EXTREMELY GRATEFUL. THANK YOU FOR YOUR VALUED SUPPORT AND THE BOOST YOU PROVIDED TO THE MORALE AND FITNESS OF OUR CREW," WROTE CHIEF WARRANT OFFICER PHILLIP DAWALT III, COMMANDING OFFICER.

330 PROJECTS FUNDED ACROSS THE COUNTRY TO SUPPORT MORALE AND WELLNESS

Supporting wellness for Coast Guard members enhances their service and helps them cope with the challenges of their demanding duties. We piloted a national partnership with the Coast Guard Chaplain Program to help families connect and build positive, supportive relationships as well as an effort in the Northeast to combat the alarming number of military suicides through peer training. The crew of each new cutter brought into service received a grant to establish their morale and wellness priorities.



CGC *CHARLES MOULTHROPE*, COMMISSIONED IN PORTSMOUTH, VIRGINIA, IN JANUARY, RECEIVED \$5,000 TO ESTABLISH A MORALE AND WELLNESS FUND.

BUILDING COMMUNITY



FRANKLIN AND EILEEN REDD, PARENTS OF SEAMAN AARON REDD, PARTICIPATED IN THE RUN TO REMEMBER EVENT ON VETERANS DAY, IN MEMORY OF THEIR SON AND ALL COAST GUARD FALLEN HEROES AND FAMILIES.



COAST GUARD FOUNDATION DIRECTOR JIM MULDOON RAN A CUMULATIVE 244 MILES IN MAY IN THE 2021 RUN TO REMEMBER.



THE PAVINI FAMILY RAN IN MEMORY OF THEIR FALLEN HERO BMCS JAMES PAVINI.



CALE IS ONE OF 140 COAST GUARD KIDS WHO TOOK PART IN THE COASTIE CAMPER PROGRAM. THIS PILOT PROGRAM PROVIDED GRANTS FOR CHILDREN LIVING IN HAWAII, CALIFORNIA, AND THE PACIFIC NORTHWEST TO PARTICIPATE IN CAMPS AND ENRICHMENT ACTIVITIES DURING SCHOOL BREAKS.

140 GRANTS PROVIDED TO COAST GUARD KIDS TO ATTEND CAMPS AND INVEST IN ENRICHMENT ACTIVITIES DURING SCHOOL BREAKS

Coast Guard families often live far from their traditional support networks so the Foundation provides opportunities for them to build community wherever they are. Coast Guard families and supporters nationwide also participated in 16 Run to Remember events and the Workout to Remember campaign raising more than \$25,000 for Fallen Heroes Scholarships and tragedy assistance programs.

WORKFORCE DEVELOPMENT



COAST GUARD MEMBERS FROM AIR STATION CLEARWATER RECEIVED THEIR AIRFRAME AND POWERPLANT LICENSES THROUGH CERTIFIED COURSEWORK FUNDED BY THE FOUNDATION. PROFESSIONAL TRAINING PROGRAMS ALLOW COAST GUARD MEMBERS TO MAKE USE OF VALUABLE SKILLS DURING THEIR SERVICE AND BEYOND.

602 COAST GUARD MEMBERS AND SPOUSES ASSISTED THROUGH OUR WORKFORCE DEVELOPMENT PROGRAMS

Workforce development programs enhance the service of Coast Guard members while they are on duty and also help spouses and Coast Guard veterans achieve meaningful careers. We assisted 393 members pursuing merchant mariner and aircraft maintenance licenses and funded 34 education grants for enlisted members pursuing education and professional training, as well as 175 spouses training to be nurses, teachers, business managers, and entrepreneurs.



ANNETTE SUAREZ IS THE SPOUSE OF A COAST GUARD HELICOPTER CREWMAN. SHE RECEIVED A SPOUSE GRANT TO HELP FUND HER RADIOLOGY TRAINING SO THAT SHE HAS A PORTABLE CAREER THAT ALIGNS WITH MILITARY LIFE. "THIS GRANT IS HELPING ME OBTAIN A FUTURE IN HEALTH CARE AND HELPING SERVE AND CARE FOR MY COMMUNITY NO MATTER WHERE THE COAST GUARD MAY SEND US. THANK YOU!"



WENDY CAPPS, WHO IS MARRIED TO A 2ND CLASS PETTY OFFICER, IS PURSUING A MASTER'S DEGREE IN HEALTH CARE ADMINISTRATION. "AS A SPOUSE, MOTHER, AND STUDENT, IT IS OFTEN MY JOB TO MAKE ENDS MEET DURING THE SHUFFLE OF EVERYDAY LIFE. ALTHOUGH IT IS SOMETIMES HARD TO BALANCE IT ALL, I HAVE LEARNED HOW TO BE RESILIENT AND QUICKLY ADAPT TO WHATEVER IS THROWN MY WAY. MY OVERALL GOAL IS TO BECOME A HEALTHCARE ADMINISTRATOR, KNOWN FOR HONESTY, INTEGRITY, AND COMPASSION."

EDUCATION



KIANNA FLEEK-DIXSON AND HER PARENTS, RETIRED COAST GUARD VETERAN PETTY OFFICER 1ST CLASS MICHAEL C DIXSON AND GAIL DIXSON. KIANNA IS A SOPHOMORE AT THE UNIVERSITY OF CENTRAL FLORIDA AND IS COMPLETING COURSEWORK TO EARN A BACHELOR'S DEGREE IN BIOLOGY. "LIVING BY THE COAST GUARD'S CORE VALUES HAS HELPED ME BECOME THE STUDENT I AM TODAY...I WILL CONTINUE TO STRIVE FOR SUCCESS."



158 SCHOLARSHIPS AWARDED, RANGING FROM \$1,000 TO \$5,000 EACH, TO COAST GUARD KIDS ENROLLED IN COLLEGE AND TECHNICAL/TRADE SCHOOLS

Foundation scholarship programs reduce student loan debt, setting Coast Guard children and their families up for stronger futures. Another eight surviving children of members who made the ultimate sacrifice received full college scholarships or education booster grants for those not yet at college-age. We also funded enrichment activities for academics, student life, and athletics at the Coast Guard Academy.

NIAH KUEMMERLE (LEFT), A STUDENT AT THE UNIVERSITY OF SILICON VALLEY, IS THE DAUGHTER OF PETTY OFFICER 1ST CLASS DEZARAY KUEMMERLE. "THE COAST GUARD FOUNDATION HAS OPENED THE DOOR TO SO MANY OPPORTUNITIES AND FOR THAT I WILL BE FOREVER GRATEFUL."



COAST GUARD ACADEMY CADETS TAKE PART IN AT-SEA SAIL TRAINING AND LEADERSHIP AND PROFESSIONAL DEVELOPMENT ABOARD THE COAST GUARD CUTTER EAGLE EACH SUMMER. IN 2021, CADETS SAILED TO PORTUGAL, ICELAND AND BERMUDA, AS WELL AS SEVERAL U.S. PORTS. USCG PHOTO BY PETTY OFFICER 3RD CLASS RYAN SCHULTZ



TABOR BUXTON IS A MEMBER OF THE CLARKSON UNIVERSITY CLASS OF 2023 WHERE HE IS PURSUING A BACHELOR'S DEGREE IN SOFTWARE ENGINEERING. HE IS THE SON OF RETIRED COAST GUARD VETERAN CHIEF PETTY OFFICER KEN BUXTON. "I MADE STRIDES TO PUT MY ACADEMICS FIRST DURING THE PANDEMIC AND ACHIEVED A HIGHER GPA IN MY FALL SEMESTER."



SIERRA WANCA, A SOPHOMORE AT THE UNIVERSITY OF ALASKA, IS THE DAUGHTER OF SENIOR CHIEF PETTY OFFICER ERIK M. PATTERSON. SHE PLANS TO PURSUE A CAREER IN WILDLIFE BIOLOGY. "BY AWARDING ME A COAST GUARD FOUNDATION SCHOLARSHIP, YOU HAVE LIGHTENED MY FINANCIAL BURDEN SO I CAN FOCUS ON MY EDUCATION. I AM EXCITED TO GIVE BACK TO OTHERS AS YOU HAVE GIVEN TO ME."

A photograph of a person standing on the peak of a jagged, rocky mountain. The person is wearing a bright yellow jacket and a hat. The sky is a clear, deep blue. In the background, there are more mountain ranges and some snow patches.

IN THE WORDS OF OUR DONORS ►

WHY WE GIVE

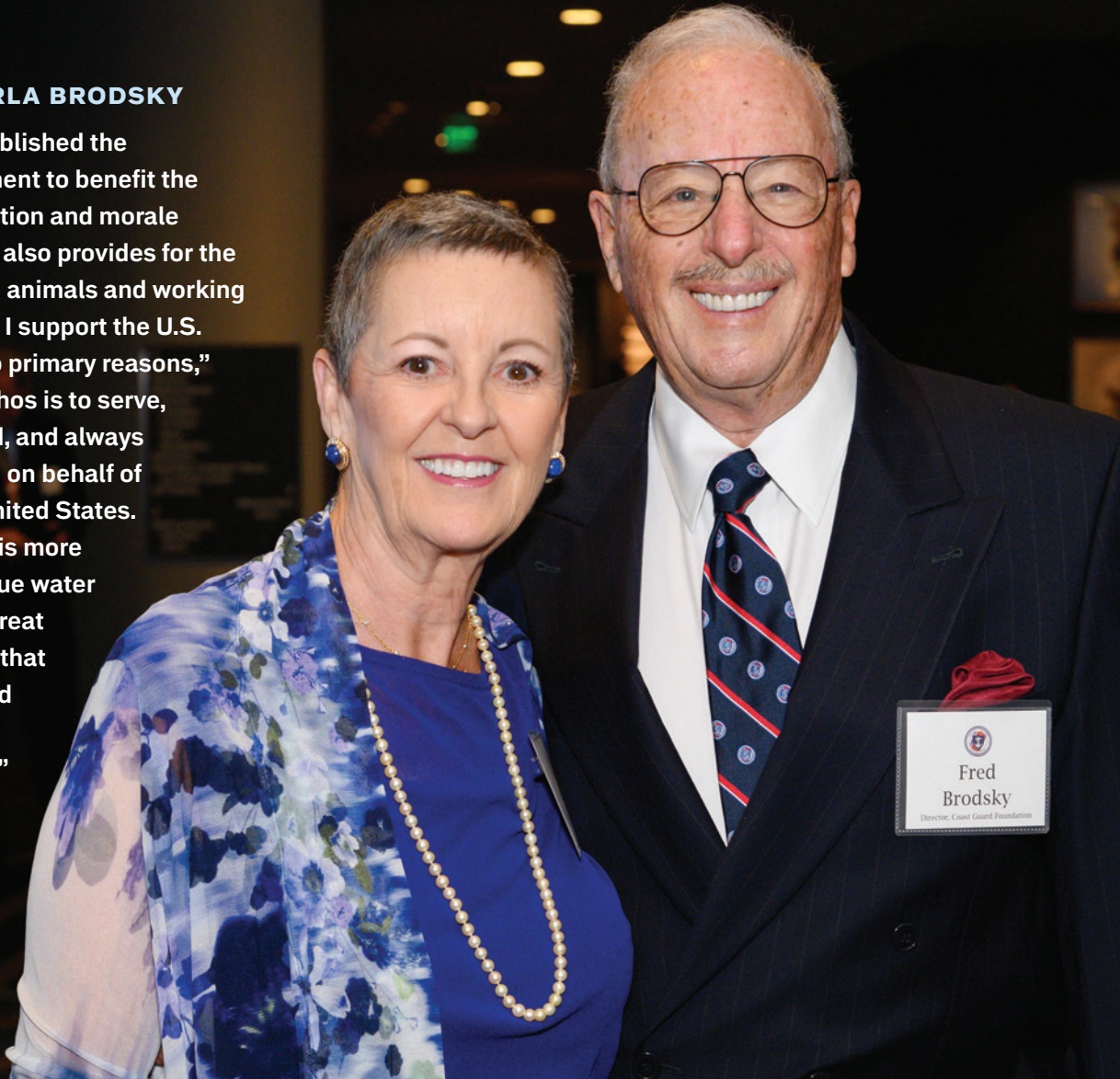
/ DUANE ZITTA

Duane Zitta is an ultra-endurance athlete and Coast Guard officer who has raised more than \$50,000 for the Foundation's tragedy assistance programs that help families who lose their Coast Guard member while in service. "It's important for me to represent Coast Guard fallen hero families in every task I take on," said Zitta. "The sacrifices they have endured, the challenges they have faced... I want them to know that we honor them and we will always remember."

LT. DUANE ZITTA BECAME THE FIRST U.S. MILITARY MEMBER TO COMPLETE THE CHUGACH FRONT LINKUP CHALLENGE IN ALASKA AFTER HE AND HIS CLIMBING PARTNER ISAAC SWANSON REACHED THE TOP OF THE 12 TALLEST CHUGACH FRONT RANGE SUMMITS IN ONE CONTINUOUS 23-HOUR PUSH IN JUNE 2021. USCG PHOTO BY ISAAC SWANSON

/// FRED AND DARLA BRODSKY

Fred and Darla established the Red Stripe Endowment to benefit the Foundation's education and morale programs. The fund also provides for the care of Coast Guard animals and working canines. "Darla and I support the U.S. Coast Guard for two primary reasons," said Fred. "Their Ethos is to serve, protect, save, shield, and always be ready to respond on behalf of the people of the United States. The second reason is more personal. We are blue water cruisers, and take great comfort in knowing that the U.S. Coast Guard has our back, so we want to have theirs."



/// MONICA ADORNO

Monica Adorno generously supports Coast Guard members in the northeast U.S., including a family resiliency program that incorporates suicide prevention training and marriage retreats. Monica shared that her inspiration is a truth handed down through the ages, "When you save one person, one human person, you are saving all of the people who live, and will live, through that one person." Through a bequest, Monica is also a member of the Coast Guard Foundation's planned giving society, the Munro Society, which is named after Coast Guard Medal of Honor recipient Signalman First Class Douglas Munro.



COAST GUARD FOUNDATION BOARD OF DIRECTORS AND TRUSTEES

THIS LIST REFLECTS THE CURRENT BOARD MEMBERSHIP AND LEADERSHIP AS OF MARCH 1, 2022

The Coast Guard Foundation is a not-for-profit organization governed by a voluntary Board of Trustees and Board of Directors. The Board of Trustees is responsible for establishing the policies, mission, and goals of the Foundation. The Board of Directors is responsible for the governance of the affairs, property, and business of the Foundation in accordance with its policies, mission, and goals. Trustees and Directors hold the Foundation's resources in trust for the public good and have overall responsibility for these resources. The board meets quarterly and sets the Foundation's direction and strategy; approves the annual budget; elects and oversees the President; and ensures compliance with regulatory standards and reporting requirements. Board committees oversee the Foundation's finances, audits, investments, HR policies, and operations. Members of the board also act as ambassadors to Coast Guard units and donors nationwide, and provide significant financial support for the carrying out of the Foundation's mission.

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† DECEASED

* COMPLETED SERVICE IN 2021

** RESIGNED IN 2021

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WE THANK OUR LEAD CORPORATE PARTNERS AND 2021 CHAIRMAN'S CIRCLE MEMBERS FOR THEIR OUTSTANDING SUPPORT THROUGH SPONSORSHIPS AND PROGRAM INVESTMENTS.



COAST GUARD FOUNDATION HONOR ROLL OF DONORS 2021

THIS REPORT RECOGNIZES DONORS WHO CONTRIBUTED GIFTS OF \$5,000 AND MORE TO THE COAST GUARD FOUNDATION DURING CALENDAR YEAR 2021. GREAT CARE WAS TAKEN TO ENSURE ACCURACY, BUT ERRORS AND OMISSIONS ARE POSSIBLE IN REPORTS SUCH AS THIS. IF YOU ARE LISTED INCORRECTLY, PLEASE CALL US AT 860-535-0786 SO WE MAY RECOGNIZE YOUR GENEROSITY IN ANOTHER PUBLICATION.

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