



Marine Corps  
Heritage Foundation



# SENTINEL

**2005 Annual Report**



The National Museum of the Marine Corps nears completion. The dedication ceremony is scheduled for 10 November 2006, with two special preview days on Saturday and Sunday, 11 and 12 November. The Museum will be open to the general public starting on 13 November.

**June 2006**

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## Marine Corps Heritage Foundation Statement of Core Values, Mission, Vision and Goals

*Adopted by a Special Meeting of the  
Board of Directors September 30, 2005*

### CORE VALUES

These are the essential and enduring tenets of the Marine Corps Heritage Foundation. They have intrinsic value to those within this organization. They define the Foundation and represent its timeless value: Integrity. Commitment. Excellence.

### MISSION

The Mission of the Marine Corps Heritage Foundation is to preserve and share the history, legacy, and traditions of the United States Marine Corps, honor the Corps' sacrifices and contributions to the development and preservation of our Nation's freedom, and educate and inspire the American public.

### VISION

The Marine Corps Heritage Foundation preserves and shares the history, legacy, and traditions of the United States Marine Corps in order to educate and inspire present and future generations of Americans. The Heritage Foundation's programs and projects are renowned for their exceptional excellence in development and execution.

In partnership with our Corps, the Foundation will develop and operate the Marine Corps Heritage Center to record history, preserve and protect priceless artifacts, and tell our story of sacrifice and contribution to the development and defense of our Nation. With the National Museum of the Marine Corps as its public showcase,



## Marine Corps Heritage Foundation

Founded to promote, through the encouragement of the study of Marine Corps History and traditions, a deeper understanding of the historical role of the United States Marine Corps and the men and women who have served as Marines.



the Foundation will also establish and sustain the Heritage Center as a center of excellence in military innovation and education.

The Foundation will continue its tradition of awards, grants, fellowships and special programs, seeking new opportunities to expand and enhance them, especially in educational outreach to our nation's youth.

Fundamental to both capital and programmatic initiatives, the Foundation will seamlessly pursue expanded private fund-raising to ensure that all efforts are fully funded and permanently sustained.

### **GOALS**

Complete the initial phase of construction of the National Museum of the Marine Corps, to include the equipping of the Museum Shop and Tun Tavern and accounting for worst-case interest costs on line of credit.

Complete the build out of the National Museum of the Marine Corps, to include future galleries, office spaces, a wide-screen theater and computer laboratory.

Complete the build out of Semper Fidelis Memorial Park, to include the Chapel.

Build an Endowment Fund, the proceeds from which will support the Foundation's legacy and future programs, to include sustaining the National Museum of the Marine Corps.

Support the Marine Corps in establishing an intellectual center of excellence to foster understanding and appreciation of Marine Corps history and traditions.

Develop, seek funding for, and implement new programs, including educational outreach.

Support the Marine Corps in further development of the Marine Corps Heritage Center property.



### **Chairman's Message**

*LtGen Paul K. VanRiper, USMC (Ret)*

Our Foundation reaches a very important milestone in 2006. The hard work of many people over past years is coming to fruition in a very tangible way. The most important and certainly the most visible manifestation of our labors is the National Museum of the Marine Corps, which is within a few months of completion. We look forward eagerly to the events surrounding the grand opening of the Museum on 10 November 2006, the 231st birthday of our Corps. None of this would have been possible without the tireless efforts of our staff, ably led by our president, Lieutenant General Ron Christmas, the support of our Founders, the important work of the Board of Directors, and the assistance of every member and campaign contributor.

As the Chairman of the Board of Directors, I am pleased to report that in addition to providing general oversight and meeting its fiduciary responsibilities, Board members have taken significant steps in the past 12 months to improve the governance of our Foundation and to meet the requirements of recently enacted legislation. To improve governance we have created a Corporate Governance Committee, a Planned Giving Committee, and added experienced members to an expanded Audit Committee. To meet requirements of legislation the Board members moved to ensure compliance

with the Sarbanes-Oxley Act, even though the act only applies to "for-profit" entities. Sarbanes-Oxley sets the "gold standard" for proper governance, the standard any Marine Corps related organization would obviously want to meet.

The Board of Directors will not rest with these accomplishments. We are in the process of examining the best way to re-incorporate the Foundation in Virginia since the Commonwealth is now where most of our activities occur and is the source of important support. At the same time, we are reviewing our businesses processes to ensure the Foundation carries out all operations as safely and efficiently as possible. To add to the experience level of the Board we have developed plans to increase the size of the Board to meet our growing responsibilities.

This is a pivotal year for the Heritage Foundation. Over the past few years both our management team and the Board of Directors have focused their attention on support of Marine Corps History programs, fund raising for the National Museum of the Marine Corps, and overseeing construction of that Museum. In the coming months we will focus on expanded support of Marine Corps History programs, continued fund raising for forthcoming projects across the Marine Corps Heritage Center, and managing the Museum's restaurant, gift shop, and interactive displays. These new and enlarged responsibilities will require the dedicated efforts of many. I am confident that we will continue to enjoy success as we move forward. As always, we will count on the continued interest and support of the members of the Foundation.





### President's Notes

*LtGen Ron Christmas, USMC (Ret)*

This edition of the Sentinel provides an annual report to our membership for calendar year 2005, the pivotal year in our efforts to build the National Museum of the Marine Corps and to develop the Heritage Center. I am pleased to report that it has been a highly successful one. We will complete construction of the National Museum in June, and have all the interactive galleries in place by October 2006. Dedication is scheduled for the 10th of November to celebrate the 231st birthday of our beloved Marine Corps. Throughout the year, you will be receiving information concerning the dedication and grand opening events.

I am also pleased to inform you that we have surpassed our initial \$50 million goal; and, because of this success, are continuing our Capital Campaign to construct the remainder of the museum and to fully develop Semper Fidelis Memorial Park. Of note, the Taylor Overlook that will lead to one of the entrances to the park will be completed for grand opening. It will feature walkways lined with commemorative bricks that continue to be purchased by our more than 65,000 supporters.

There are now three different "Gift of a Lifetime" brochures for you to peruse that provide potential donors with naming opportunities from epoch galleries to commemorative bricks and shrubbery. If you are interested in reviewing these brochures, please

contact the Foundation's office. The staff will be very happy to provide them to you. I know that you will be very pleased with our National Museum and Semper Fidelis Memorial Park when they are completed, and I hope that you will continue to take advantage of these sponsorship opportunities.

We have also continued to enhance our support for the Marine Corps' other historical programs. This past year found us providing the major support for the sculpting and installation of a larger than life size statue of John Phillip Sousa at the new Band Hall located at Marine Barracks, Washington, DC, the oldest post of the Corps. The project was made possible thanks to the bequest of a longtime member and ardent supporter of The President's Own, the Marine Band. We also assisted in improvements to the historic Home of the Commandants, while honoring the veterans of the Battle of Iwo Jima on their 60th anniversary. Additionally, in conjunction with the National Park Service and the Pennsylvania Historical and Museums Commission, we placed a historic marker commemorating the location of Tun Tavern in Philadelphia, Pennsylvania.

These special projects did not prevent us from fully supporting all requests made by the History and Museums Divisions of the Marine Corps University. You will remember that the Marine Corps' History and Museums Division, previously located at the Historical Center, Washington Navy Yard, was split up and reassigned to the University in 2005.

There is great deal more to report and it can be found on our new web site <http://www.marineheritage.org>. I commend the web site to you for current information concerning all of the Foundation's programs, an up-to-date construction report with photographs, the ability to shop on-line at our exclusive Museum Shop, and so much more!

Yes, 2005 has been a pivotal year in bringing our dream of a Marine Corps Heritage Center, with the National

Museum as its centerpiece, to reality. We are almost there! The Foundation is sound financially; we continue to support the historical programs important to the Marine Corps; and we are about to present to the American people a national treasure. None of this could have been done without you. Our members and supporters continue to exemplify the spirit of Semper Fidelis. Thank You! 2006 will be our year to celebrate. I hope to see each one of you at the dedication and grand opening events.

### Chief Operating Officer's Notes

*BGen Gerald L. McKay, USMC (Ret)*

At the time that I last reported to you, we were just commencing construction on the National Museum of the Marine Corps. Today we are within months of completing the construction of Phase I of the Museum. Phase I contains 115,000 square feet of space that will contain exhibits, Tun Tavern, the Mess hall, Museum Store and offices. The Foundation intends to turn over the building to the Marine Corps sometime around the end of July. The installation of macro exhibits (aircraft, tanks, and landing craft) is already complete and installation of micro artifacts and construction of tableaus, vignettes, and immersion galleries will start in earnest in late June. This will lead us to our formal dedication on 10 November 2006.

During the time that we have had the Museum under construction, we have also been planning for the construction of Semper Fidelis Memorial Park. I am pleased to report that Phase I of that effort will also be ready for our dedication ceremony. The Park, with its' trail system, and eventually a chapel, will be a magnificent addition to the Heritage Center. The Foundation is already working with a number of organizations that desire to place monuments that recognize various units and fallen comrades.

As we look to the future, we have



already started design for an office complex in the Museum and also for additional trails that will lead up to the proposed chapel in Semper Fidelis Memorial Park. It is our intention to design the entire Park and also, as funding allows, to begin design for the remaining 80,000 square feet of exhibit and other spaces in the National Museum of the Marine Corps.

The Museum is already generating a great deal of interest, and hardly a day goes by that we do not have a group of visitors that tour the site. I am confident that when you are able to visit the National Museum of the Marine Corps, you will be impressed and proud of your museum.

### 2005 Foundation Highlights

*SgtMaj Halsey W. Smith, Jr.,  
USMCR (Ret)*

During the past year the Marine Corps Heritage Foundation made a quantum leap in its efforts to bring the National Museum of the Marine Corps to fruition. A number of naming opportunities were secured, highlighted by Anheuser-Busch sponsoring Tun Tavern and one of the Founders sponsoring the flight simulator. The museum is on schedule with opening ceremonies planned for 10 November 2006. The logistics of such a massive undertaking is well underway with a detailed plan of activities. This will include an expected crowd of 35,000 members, donors, and guests. Large artifacts, such as aircraft, tanks, and artillery pieces have been placed in the Museum. Exhibit fabrication is underway with the Foundation scheduled to turn the building over to the Marine Corps on 1 August.

The Foundation has been active in our traditional goals, increasing membership to 65,000, and total donations received to more than \$57 million. New levels of campaign memberships were instituted.

In July 2005, the United States Mint 230th Anniversary Marine Corps silver dollar was launched at Quantico. Within

a few months, all 600,000 coins had been sold, providing the Foundation with a total payment of \$6 million toward construction of the National Museum.

The Foundation staff has been expanded to adequately meet increased demands. Jason Gardy has come on board as Information Systems Manager, Jennifer Vanderveld as Development and Marketing Programs Manager, and Charlotte Burrell as Data Entry Clerk. We have been successful in managing these additions and the expenses of the Museum within budget. Our overhead expenses (general administrative and fundraising costs) were reduced from 18% of revenue in 2004 to 11.58% for 2005.

The Board of Directors reviewed



*The LVT-1 Alligator and Sikorsky HRS-1 were moved into Leatherneck Gallery.*

and approved a revised Vision and Mission Statement as well as instituting Code of Ethics, Conflict of Interest, and Whistleblower policies for all directors, staff, and volunteers. A Human Resources Analysis was conducted to review salaries, job descriptions, and employee benefits after which recommended changes were implemented. Mr. Dave R. Parker replaced Col Edward M. Condra III, USMC (Ret), as Board Vice Chairman.

The Foundation also provided \$100,000 for a bronze statue of John Phillip Sousa to be placed in the entrance of the new Sousa Band Hall in Washington, D.C.

## Results of Membership Ballot

In December 2005, the Chairman mailed to the membership a letter enclosing a ballot to be returned by 27 January 2006. That ballot addressed the Director candidate election, amendments to the Articles of Incorporation, and a resolution authorizing a change in the Foundation's domicile. A total of 949 ballots were returned, and the results were:

Each of the six Director candidates recommended by the Nominating Committee and listed below received an approval ("Yes") vote on 89 percent or more of the returned ballots. The following Directors will each serve a three-year term:

- Mrs. Maria Crowley
- Major Calvin C. Frantz,  
USMC (Ret.)
- LtCol Clyde J. Johnston,  
USMC (Ret.)
- Mr. Edmund A. Matricardi, Jr.
- Mr. David R. Parker
- Mr. Robert B. Starke, Jr.

The proposed amendments to the Articles of Incorporation received an approval ("Yes") vote on 94 percent of the returned ballots. Thus, the Articles of Incorporation are amended to:

1. Expand the Board of Directors to be not fewer than 6 and not more than 30 Directors.
2. Authorize the Board of Directors to modify the classes of membership by amendments to the Bylaws.
3. Recognize the institutional class of members previously authorized by the Board of Directors
4. Authorize the election of future directors by the Board of Directors.
5. Renumber paragraphs to correct a previous typographical error.

The following Resolution was adopted by an approval ("YES") vote on 89 percent of the return ballots:

**RESOLVED**, that the Executive Committee of the Marine Corps

Heritage Foundation (“Foundation”) Board of Directors is hereby authorized and directed to immediately take all steps necessary to change the Foundation from being a non-profit corporation domiciled in and subject to the District of Columbia Code, to being one formed under and subject to the laws of the Commonwealth of Virginia, if and as recommended by outside legal counsel and tax consultants engaged by the Foundation.

### Treasurer’s Report

*Mr. Thomas Eiff*

Financial Statements: As construction of the National Museum of the Marine Corps comes ever closer to completion, your 501(c)(3) Heritage Foundation assets have increased to \$65,999,554 as of 31 December 2005, compared to \$33,077,287 as of 31 December 2004 (\$70,570,664 as of 31 March 2006). Total revenues, including membership dues, donations, royalties, investment income, and gift shop sales were \$21,279,388 at year-end; revenues exceeded expenses by \$16,785,529 (\$5,778,044 and \$4,766,208, respectively, as of 31 March 2006).

The anticipated total cost of building out is \$49,000,000, 79% complete as of 31 December 2005, and 89% complete as of 31 March 2006. Pledges (\$16.3 million as of 31 December 2005 and 31 March 2006) and a line of credit (\$15.6 million as of 31 December 2005 and 31 March 2006) fund the construction.

Investment Management: During 2005, Wachovia Trust completed its second full year of providing investment management services to the Foundation, operating under an Investment Policy protocol recommended by the Foundation Investment Management Committee and approved by the Foundation Board of Directors. The operating account, designated for construction costs and other operating funds is invested conservatively in fixed income funds and securities to match the Museum’s short-term needs. The recently established Semper Fidelis

Park account designated for the Semper Fidelis Memorial Park totaled \$857,000 as of 31 December 2005 (\$1.2 million as of 31 March 2006), and is managed in similar fashion to the operating account. The endowment (pooled) account is well diversified across a number of asset classes, and continues to outperform its benchmarks with assets totaling more than \$1.66 million on 31 December 2005 (\$1.77 million as of 31 March 2006). Wachovia currently carries additional duties as consultant and manager of the Foundation’s Planned Giving program and assets.

### Grants and Fellowship Committee Report

*Dr. Leonard Vanderveld, Jr.*

Five research grants were awarded this past year; the first, for \$3,000, to Thomas J. Eley, a former Marine captain and historical geographer who resides in Anchorage, Alaska, for a study of the history of Marine activities in Alaska from 1867 to the present. The second grant, for \$2,000, was given to Dr. Kenneth W. Estes, a retired Marine lieutenant colonel and author of a number of works of which *Marines Under Armor* (2000) is the most recent. Dr. Estes will produce a monograph on the 1st Provisional Brigade at Pusan, Korea.

The third grant, of \$3,000, went to noted author and retired Marine Lieutenant Colonel Otto J. Lehrack, for a study of the 1967 Que Son Valley operations in Vietnam. Frederick R. Muller, a student at Pike Peak Community College in Colorado Springs, Colorado, was awarded a small grant of \$500 for a study of Carlson’s Long Patrol with the 2d Raider Battalion in 1942 on Guadalcanal. The final research grant, of \$2,000, was given to C. Douglas Sterner, a Vietnam War veteran and information technology instructor, to develop a Navy Cross and Distinguished Service Cross database containing names, pertinent information, and full-text citations of all Marines and Navy Corpsmen

serving with Marine units. One request for funding was denied due to a lack of relevancy to Marine Corps history.

Navy Commander Henry J. Hendrix II was awarded the General Lemuel C. Shepherd Jr. Memorial Dissertation Fellowship for 2005 in the amount of \$10,000 for a study of “Theodore Roosevelt’s Use of the U.S. Navy/Marines as an Instrument of Diplomacy.” Commander Hendrix, a doctoral student at Department of War Studies, King’s College London, currently is assigned as officer in charge, Detachment Four, Tactical Air Control Squadron 11, on board the *USS Peleliu*, supporting operations of the 11th Marine Expeditionary Unit. A single Lieutenant Colonel Lily H. Gridley Master’s Thesis Fellowship of \$3,500 was given to Joshua W. Montandon, a graduate student at the University of North Texas, Denton, Texas, for his study “The Marine Way of War: Korea, 1950-1953.”



*Cmdr Henry J. Hendrix II was awarded 2005 Shepherd Fellowship.*

### 2005 Foundation Awards

*Col Nicholas E. Reynolds,  
USMCR (Ret)*

Held on 20 May 2005, at the Sheraton Premiere Hotel at Tysons Corner, Virginia, the Foundation’s Annual Awards Banquet acknowledges the



Gen James E. Cartwright, Commander, U.S. Strategic Command, was the military guest of honor.

exemplary work of many individuals:

The **General Wallace M. Greene, Jr., Award** for best Marine Corps-related non-fiction book was given to Evan Wright, *Generation Kill* (Putnam, 2004). This book about Recon Marines in the first phase of Operation Iraqi Freedom showcases some vivid writing, and, while generally favorable to the Marine Corps, tells the whole story, warts and all.

The **Colonel Robert Debs Heinl, Jr., Award** for best Marine Corps-related

article was presented to Captain Robert S. Burrell, USMC, "Breaking the Cycle of Iwo Jima Mythology: A Strategic Study of Operation Detachment," *Journal of Military History* (October, 2004). A very thoroughly researched revisionist analysis of the operational background to the battle for Iwo Jima.

The **General Roy Stanley Geiger Award** for best Marine Corps aviation article was awarded to Lieutenant Colonel Pat Gramuglia and Major Rick Phillips, "Aviation Integration in Operation Iraqi Freedom I: A Division Air Officer's Perspective," *Marine Corps Gazette* (May, 2004). The article is an analysis of the employment of aviation assets in support of 1st Marine Division in Iraq.

The **Sergeant Major Dan Daly Award** for best article about Marine Corps history from a post or station periodical by an enlisted writer was given to Corporal Cecilia Sequeira, "Raiders fly history to Ohio," *Flight Jacket* (MCAS Miramar, 29 May 2004). It is the story about an historical C-130 that made history when it landed on an aircraft carrier in 1963

The **Major Norman Hatch Award** for best Marine Corps-related motion picture or video was presented to JO1(SW) Christian Gearhart, USN,

for "2004 Marine Corps Marathon." Second and third place awards were given to Corporal Charles Allen, USMC, for Cobra Gold LAR Company and Jungle Survival Training videos.

The **Sergeant William Genaust Award** for best Marine Corps-related motion picture or video news story was awarded to Sergeant Daniel Kauppila for "2004 CMC Birthday Message." Second place was given to Corporal Charles Allen, USMC, for "U.S. Navy Chaplain Corps," while the third place was presented to Corporal Trevor M. Carlee, USMC, for "9."

The **Colonel John W. Thomason Award** for best Marine Corps-related art work was presented to Jack Dyer, the former curator of the Marine Corps art collection who, over the course of three decades, deployed to numerous Marine operations and created hundreds of works of combat art.

The **Colonel John H. Magruder III Award** for best depiction of a Marine Corps subject by a museum was given to the Marine Detachment exhibit on board the USS *Alabama*, prepared by former World War II Marine George C. Plataz.

The **General O.P. Smith Award** in recognition of a special contribution to the preservation of the heritage of



The civilian guest of honor was Walter Anderson, Chairman and CEO, Parade Publications.



Assembled recipients of the Marine Corps Heritage Foundation's 2005 Awards.

the Marine Corps was presented to Allan Millett and Jack Shulimson, eds., *Commandants of the Marine Corps* (U.S. Naval Institute, 2004).

**The Distinguished Service Award** was given Colonel Gerald H. Turley for his extensive accomplishments toward the perpetuation of Marine Corps history and his selfless dedication to the mission and work of the Marine Corps Heritage Foundation.

**The Heritage Award**, given in recognition of extraordinary contributions over an extended period to the work of the Marine Corps Heritage Foundation and to Marine Corps history, was given, in memoriam, to Alfred Lerner, “for his selfless commitment to the United States Marine Corps and the campaign to build the National Museum.”

## From DC to Quantico: What’s New in History

Mr. Charles D. Melson  
History Division

On 1 September 2005, the History and Museum Division of Headquarters, U.S. Marine Corps completed the most significant change that had occurred in its structure since it was first formed in 1971; it moved to Quantico, Virginia, and its elements scattered among the Marine Corps University. These events were set in motion in October 2002 with the transfer of responsibility for the Marine Corps Historical Program from Headquarters to the university. In part, this reduced the staff responsibilities of Headquarters and made sense in light of the interest and funding going to the National Museum of the Marine Corps.

The changes were most dramatic. The Marine Corps Historical Center (Building 58) in the Washington Navy Yard was vacated and the active-duty Marines were absorbed by the university headquarters, which now assumed the role previously held by the division’s support branch. The library and archives holdings were integrated into the Gray Research Center collections

along with the librarian and archivists positions. Museum branch personnel were consolidated, along with the artifact collections, into the Museums Division located at various sites in and around Quantico. With the hiring of Director Lin Ezell, the division evolved into the National Museum of the Marine Corps.

The remaining history and field history branches ended up in Building 3079 located on the Marine Corps University campus. The History Division was created to include History Writing, History Reference, Oral History, and Field History Branches.

Several valued employees retired or moved onto other positions, among them Colonel John W. Ripley, director, Evelyn A. Englander, librarian, Frederick J. Graboske, head archivist, Catherine A. Kerns, visual information specialist, and Scott N. Summerill, senior editor. Since arriving at Quantico, the personnel losses were identified and made up (an exception

functioning of the Marine Corps Historical Program. Also on the commission were Lieutenant General Paul K. Van Riper, Brigadier General Edwin H. Simmons, Brigadier General James F. Lawrence, Colonel Joseph H. Alexander, and Colonel Nicholas E. Reynolds. Colonel Camp acted as the recorder. The group focused on the future roles of the History Division and the National Museum of the Marine Corps in light of past and present experience. Recommendations for a “way ahead” were made to the Marine Corps University, Training and Education Command, and the Commandant of the Marine Corps.

Despite the loss of a substantial portion of its resources, the History Division was still able to publish two monographs and an edition of *Fortitudine*. The monographs were Major Thomas W. Crecca’s *U.S. Marine Corps Reserve Operations: 11 September 2001 to 1 November 2003* and Colonel Dennis P. Mroczkowski’s



*The History Division now occupies Building 3079, a temporary facility, located near the Staff Noncommissioned Officer Academy at Quantico.*

being the Editing and Design section which remains short staffed). Retired Colonel Richard “Dick” Camp was hired as Deputy Director and a search was begun to identify and hire a new Director.

In April of this year, a series of meetings were held, chaired by former Commandant General Carl E. Mundy, Jr., to examine the organization and

*Restoring Hope: In Somalia with the Unified Task Force, 1992-1993*. Marine field historians and a combat artist were deployed to Iraq as well. It is hoped that this renewed interest in the History Division at its Quantico location, along with the attention given the National Museum of the Marine Corps, will bode well for the future.



**ATTENTION FORTITUDINE READERS AND SUBSCRIBERS:** The last issue published was Historical Bulletin Volume XXXII, Number 1. With the restructuring under the Marine Corps University, the standing up of the National Museum of the Marine Corps, and the loss of editing and design staff, scheduled publication is not possible at this time. Publication will resume at a later date and we ask our readers to bear with us until then.

## Simmons History Center Dedicated

The future wing of the General Alfred M. Gray Marine Corps Research Center at Quantico, Virginia, was dedicated on 7 October 2005 as the Brigadier General Edwin H. Simmons Marine Corps History Center in honor of the Marine who served as director of the Marine Corps History and Museums Division for 25 years.

A highly decorated veteran of World War II, Korea, and Vietnam, Brigadier General Simmons was the former managing editor of the Marine Corps Gazette, naval attaché to the Dominican Republic, co-founder of the Marine Corps Historical (now Heritage) Foundation, and author of more than 300 articles in addition to *The United States Marines: A History*, the illustrated history *The Marines*, and *Dog Company Six*, a Korean War novel.

As the Commandant, General Michael W. Hagee, noted: “Brigadier General Simmons’s dedication to our Corps’ values and the example he has set throughout his life is worthy of the highest praise and appreciation. Not only did General Simmons serve as an outstanding Marine Corps officer, but he also worked as an illuminating historian who redefined how the Marine Corps should gather, maintain, and promote its historical legacy. As the architect of the Marine Corps Historical Program, General Simmons dedicated tremendous energy and effort



*Retired BGen Edwin H. Simmons, with his son Clarke, and Gen Michael W. Hagee, Commandant of the Marine Corps, flank the sign marking the site of the new wing of the Gray Research Center. “It is the greatest honor of my life,” Simmons said in a statement read by his son, Clarke.*

to ensuring that our Corps’ legacy of heroism, sacrifice, and valor will never be forgotten....Without his vision and hard work, Marine Corps history would not be as complete, accurate, or cherished to the same degree as it is today.”

Once completed, the History Center will include the Historical Branch, Field History Branch, Historical Reference Branch, and the Editing and Design section of the former Marine Corps History and Museums Division.

## 2005 Internships

The year was filled with many changes and challenges. The History and Museums Division bade farewell to its longtime home in Building 58 on the Washington Navy Yard, and in September it moved south--box, clocks, and carrel--to new quarters on Marine Corps Base, Quantico, Virginia. The museum staff shrank in numbers while increasing endeavors, on a decreasing timeline, to open the new National Museum of the Marine Corps by 10 November 2006. Interns were key to accomplishing on-going projects and meeting these deadlines. Twenty interns worked 4,520 hours for history and museum staff supervisors including

160 hours compiling an inventory of the combat art collection; 240 hours categorizing oral histories; 896 hours in the Reference Branch serving Marines in the field, answering Congressional, media, and civilian inquiries; 230 hours researching archival collections of photos and documents; 1,544 hours in support of history writing; and 967 hours in museum staff support including collections care, database management, and restoration. One intern logged 1,325 hours researching and writing artifact labels and exhibit text. The Marine Corps Heritage Foundation’s support of these internships totaled \$36,523.81 for the year.

Interns continued to represent a nationwide profile of colleges and universities, although the attraction of working in Washington, D.C., certainly must have contributed to their interest. We hope the new museum and the invigorated history division will continue to attract qualified students.

## Combat Artist Exhibits Work

Staff Sergeant Michael Fay, USMCR, recipient of the Foundation’s 2003 Colonel John W. Thomason Award, was honored by the Farnsworth

Art Museum in Rockland, Maine, with an exhibit of his Marine Corps combat art from Afghanistan and Iraq. The exhibit, sponsored by the Marine Corps Heritage Foundation and titled "Fire and Ice," ran from 6 February to 27 March 2005, and featured Staff Sergeant Fay's watercolors and pencil sketches of combat and humanitarian operations in the numbing cold of Kandahar in January and the searing 130 degree heat of Babylon in June.

The modern Marine Corps' first combat artist, Colonel John W. Thomason, produced a series of battlefield sketches during World War I. The Marine Corps Combat Art Program officially originated under Brigadier General Robert Denig during World War II; was revived by artists such as Avery Chenoweth during the Korean War; and reconstituted by the Commandant, General Wallace M. Greene, Jr., after Marine Corps troops were committed to combat in Vietnam in 1965. The Marine Corps art collection now holds more than 7,500 pieces, the works of more than 350 artists.



Mrs. Susan Hodges and Mr. Wayne Spilove unveil the Tun Tavern marker.

### Tun Tavern Marker Dedicated

On 11 November 2005, representatives of the Marine Corps Heritage Foundation, the Marine Corps League, the National Park Service, and the Pennsylvania Historical and Museum

Division attended a ceremony in Philadelphia during which a state historical marker was unveiled to mark the location of Tun Tavern, historically regarded as the birthplace of the United States Marine Corps. The Heritage Foundation, with the help of donations provided by HMM-772 at nearby Naval Air Station Willow Grove, Pennsylvania, supplied funding for the marker and its installation on the east side of Front Street, between Chestnut and Walnut Streets. Extensive research by the park service indicates the tavern, which stood from 1693 to 1781, was most likely located approximately 50 yards to the east and 50 to 75 feet below ground level of where the marker stands today.

Mrs. Susan Hodges, the Foundation's Vice President for Administration and Finance, along with Brigadier General Ronald S. Coleman, who was the Commandant's representative, participated in the unveiling of the marker and the laying of a wreath at its base.

## The Marine Corps Museum Shop

### A. USMC KA-BAR KNIVES

These knives are replicas of the original USMC fighting/utility knife of WWII. The 1095 carbon steel blade is epoxy powder coated. The grooved handle is of highly compressed genuine cowhide leather washers. A leather sheath bears the KA-BAR trademark and the Marine Corps Emblem. A lifetime warranty is included.

<b>15-608IRAQ</b>	Iraqi Freedom	<b>\$75.00</b>
<b>15-608V</b>	Vietnam	<b>\$75.00</b>
<b>15-608IWO</b>	Iwo Jima 60th Anniversary	<b>\$75.00</b>
<b>15-608K</b>	Korean 50th Anniversary	<b>\$75.00</b>
<b>15-608</b>	USMC Classic	<b>\$68.00</b>

### B. FINAL TRIBUTE PIN

The final tribute pin consists of an inverted rifle in a boot and capped by a helmet. Made of jeweler's metal with a matte antique brass finish.

<b>03-158</b>	<b>\$5.00</b>
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(Order form & more items on page 19.)



A.



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B.



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 LtCol William C. Vielhauer,  
 USMC (Ret)  
 Capt Robert Visci  
 Mr. David E. Vlasak  
 Mr. Dennis W. Voge  
 Sgt John W. Vogel, USMC  
 LtCol Norman H. Vreeland,  
 USMC (Ret)  
 LtCol Michael A. Wabrek, USMC  
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 Mr. Charles Walker  
 Mr. Jack W. Walker

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 Mr. James R. Wallace  
 Col Thomas E. Wallis, USMCR  
 Mr. Henry Walsh  
 Sgt John J. Walsh, Jr., USMC  
 Mr. and Mrs. Harry R. Warren  
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 Mrs. Lucinda F. Waters  
 Mr. David S. Watkins  
 Mr. Walter T. Weathers, Jr.  
 Col Dwight D. Weber, USMC (Ret)  
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 Capt Kennard W. Webster  
 Mr. Ronald Dan Webster  
 Mr. Matthew A. Weick  
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 Mr. Ted Wieseman  
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 Mr. Robert J. Williams  
 Mr. Tom Williams  
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 MGySgt Peter J. Wilson, USMC  
 Mr. Richard David Wilson  
 Cpl Steven B. Wilson  
 Col John T. Winkler, USMC (Ret)  
 Mr. Wayne D. Witham  
 Mr. Alfred K. W. Won  
 Major Thomas T. Wood, USMC (Ret)  
 Mr. and Mrs. Carlton Woodard  
 Dr. D. Robert Worley  
 LtCol Jonathan P. Wort, USMCR  
 1stSgt Robert A. Yarumian,  
 USMC (Ret)  
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 Mr. Mark Zmyslowski

## Support Through Planned Gifts

As all Marines know, the heritage of the United States Marine Corps is the basis of what makes the Corps second to none. From the time we first became Marines, we learned that we had become part of Marine Corps heritage and that Marine Corps heritage had become part of us. That is what makes a United States Marine different from all other Service men and women.

With the grand opening of the National Museum of the Marine Corps fast approaching some of us may mistakenly believe that the battle to perpetually memorialize Marine Corps heritage and offer a glimpse of Marine Corps history to the general public is over and won. Nothing could be further from the truth. Now more than ever each of us must answer the call to ensure that the National Museum of the Marine Corps will continue to preserve and present the history and heritage of the Corps in the highest tradition. Funds will be continuously needed for future galleries, exhibits/artifacts and artifact preservation. We can endow the future of the Heritage Foundation and the National Museum of the Marine Corps by building endowment assets to support programs, awards and additional cash flows for museum operations as needed. Throughout history Marines have always answered the call. As we all know, Marines always move toward the sound of "musket fire" not away from it. The musket fire you hear today is the call to all Marines, and friends of Marines, to support the Marine Corps Heritage Foundation and the National Museum of the Marine Corps for the benefit and education of future generations to come.

Many of us World War II, Korea, and Vietnam-era Marines look back to the time we served in the Corps and give tribute to the men and woman with whom we served and to how that time of our lives helped shaped our future. We know that being a Marine was/is



more than just “doing your time” in military service. Now that our families are grown and our children are on their own, we naturally think back to the most meaningful events in our lives and I know I speak for all Marines when I say being a Marine was the foundation upon which a lifetime of successes was built. Now is the time we have an opportunity to give something back to the Corps, and gain the personal satisfaction of doing something good that will last and make a difference to our history and to future generations.

That is where making a planned gift to the Marine Corps Heritage Foundation (the “Heritage Foundation”) to preserve the heritage of the Marine Corps comes in. Each Marine, past, present and future can make a difference in preserving that heritage and making the National Museum of the Marine Corps a national showplace for all to enjoy and experience some of what the Marine Corps is all about.

What is planned giving? Simply put, planned giving is a “win win” situation for you (the “donor”), and the Heritage Foundation. It is a “win” for the donor because it will provide benefits and tax advantages for the lifetime of the donor, and a “win” for the Heritage Foundation, the ultimate beneficiary of the gift. Planned gifts are tailored to the wishes of the donor and are usually made from funds and assets other than income, so making a planned gift generally has little or no effect on the donor’s standard of living and can provide funding to the Heritage Foundation to preserve Marine Corps heritage and support the National Museum of the Marine Corps. Planned giving is an integral component of any well thought out estate plan. Planned

## Taps

Since the last issue of Sentinel was published in Fall 2004, the Foundation has been notified of the passing of the following members. The Foundation staff extends its condolences to their family and friends.

Mr. Bradford E. Almy	MSgt Michael Neporadny, USMC (Ret)
Col Hazel E. Benn, USMC (Ret)	Mr. Charles J. O’Neill
Mr. Edwin Bernstein	Mrs. Jack L. Reed
LtCol John F. Bolt, USMC (Ret)	BGen Ernest R. Reid, Jr., USMC (Ret)
MajGen John G. Bouker, USMC (Ret)	Cpl Frank F. Rhodes
Col Joseph A. Bruder, USMC (Ret)	Mr. Felix Salgado, Jr.
Col James F. Burke Jr., USMC (Ret)	Mr. Walt Sandberg
Robert E. Bush, MOH	Col Michael N. Scelsi, USMCR (Ret)
LtCol John W. Campbell, USMC (Ret)	LtCol Otto M. Schmidlen, USMC (Ret)
MajGen John P. Condon, USMC (Ret)	Maj Robert C. Sebilian, USMC (Ret)
SgtMaj Robert A. Creedon, USMC (Ret)	David E. Severance
Mr. C. Landon Fallin	BGen Clifford H. Shuey, USMC (Ret)
Mr. Robert E. Galer	Col Samuel W. Smith, USMC (Ret)
LtCol Ralston R. Hannas, USMC (Ret)	Mr. William J. Smith
Cpl Robert M. Hayter, USMC	BGen Joseph L. Stewart, USMC (Ret)
LtCol Homer Hutchinson, USMC (Ret)	Capt James R. Taylor, USMC (Ret)
Col George M. Lhamon, USMC (Ret)	SgtMaj Frank Turse, USMC (Ret)
Commodore Tommy J. Lupo	BGen Joseph F. Wagner, USMC (Ret)
Ms. Jeanne MacGregor	MajGen Mitchell J. Waters, USMCR (Ret)
Mr. Robert R. Manchester	Col Morgan West, USMC (Ret)
Mr. Peter F. Martin	Mr. Rodney Williams
SgtMaj C.A. McKinney, USMC (Ret)	Col Roger Willock, USMC (Ret)
Mr. John F. McLaughlin	Gen Louis H. Wilson, USMC (Ret)
Gen Kenneth McLennan, USMC (Ret)	Mr. Royal Q. Zilliox
BGen Edward B. Meyer, USMC (Ret)	

giving is a great way to accomplish the donor’s lifetime and testamentary goals.

A few options to consider in making a planned gift are: (1) Bequest by Will; (2) Outright Gifts of Appreciated Property, such as gifts of stock to reduce your tax burden; (3) Life Income Gifts, such as remainder trusts and gift annuities; (4) Life Insurance Policies naming the Foundation as your beneficiary or co-beneficiary; (5) Retained Life Estate

in real property; and (6) Gifts of “tax qualified” retirement plan assets.

### *Bequest by Will*

Ideally, all of us should have a will. To die without a will means you leave it up to the laws of the state in which you reside to determine how your assets are to be distributed and to whom. That is not a good idea. Each of us should take the time and interest to direct how,

when and to whom our hard earned assets shall pass when we die.

A monetary bequest in a donor's will is perhaps the easiest and simplest of planned gifts, yet still gets the job done. A will bequest is where the donor designates either a specific dollar amount or a percentage of their estate to go to the Heritage Foundation. In addition to supporting the Heritage Foundation to preserve Marine Corps history, it serves as an example to your heirs of the values and ideals you hold dear. It is a statement for your heirs to hear loud and clear. A bequest can also reduce the amount of your taxable estate, which may increase the actual amount available to your loved ones.

In addition to outright bequests, a will can contain trust provisions to provide for many of the options discussed in further detail below.

### ***Outright Gifts of Appreciated Property***

This type of planned gift to the Heritage Foundation allows the donor to save taxes three ways: through the charitable deduction for the market value of the gift at time the gift is made, the avoidance of capital gains tax on the appreciation of the gift during donor's ownership, and the removal of the asset from the donor's estate, while providing the Heritage Foundation, with the full market value as of the date of the gift free of taxes. This gift concept is ideal for appreciated stock, real estate and other property that has appreciated in value since its acquisition.

### ***Life Income Gifts***

This type of planned gift is popular because it can help donors realize their lifetime income objectives while, at the same time, making a major future gift to the Heritage Foundation. Such gifts are generally funded by appreciated stock, bonds or real estate. The donor also saves taxes in the three ways as in the planned giving of Outright Gifts of Appreciated Property, discussed

above. Two examples of life income gifts are, charitable remainder trusts and charitable gift annuities. Donors considering this form of planned giving should consult an estate planning attorney or other qualified professional and have their representative contact the Heritage Foundation for additional information.

### ***Life Insurance Policies***

Naming the Heritage Foundation as beneficiary or owner and beneficiary can establish substantial benefit to the Heritage Foundation with modest out-of-pocket cost to the donor. Life insurance policies are a particularly good vehicle of planned giving for younger donors and those donors who have paid-up policies which may no longer be needed for the original purpose. Donors who have old policies once acquired for other reasons (i.e., mortgage or debt risks, education for children, survivor income security or veterans' policies) may no longer need the coverage and choose to transfer ownership to the Heritage Foundation. By doing so, then besides removing the asset from the donor's estate, it will often generate an income tax deduction equal to the lesser of the cost basis or fair market value of the policy. A form designating a change of a donor's beneficiary or assignment of ownership is all that is needed to create this form of planned gift.

### ***Retained Life Estate***

A retained life estate is created by making a donor's gift of a home, farm or other real property with the donor retaining the right to live in or use the property for the remainder of the donor's lifetime. This form of planned gift entitles the donor to use, occupy, or farm the property during the remainder of the donor's lifetime and following that the fee simple title is vested in the Heritage Foundation. This type of planned gift is popular where a donor desires to retain the use of the gift until

they die. Also, the asset is removed from the donor's taxable estate while benefiting the Heritage Foundation with the full value of the asset.

### ***Gifts of "Tax Qualified" Retirement Plan Assets***

By naming the Heritage Foundation as beneficiary of your IRA, 401(k), or other tax qualified retirement plans the Heritage Foundation will receive the value of the asset at the death of the donor and the asset will be removed from the donor's taxable estate. This form of planned giving is an easy way for donors to make a charitable donation through planned giving to the Heritage Foundation and help support the preservation of Marine Corps heritage.

All of the planned giving strategies outlined here in very broad terms require the assistance of a qualified professional for specific and authoritative application. There are tax issues that need to be addressed in light of each donor's overall estate plan and future needs. Donors interested in implementing one or more of these "win win" planned giving opportunities should consult with their attorney, tax consultant, or financial planner. If you desire, members of the Development and Planned Giving Committee of the Marine Corps Heritage Foundation are available to discuss planned giving with your attorney or other professional advisors to assist them with helpful background material. Please feel free to call the offices of the Marine Corps Heritage Foundation for further information.





Marine Corps Heritage Foundation  
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Quantico, VA 22134-0420

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# Dog Tags Needed



## Dog Tags Needed

The Gift Shop in the new National Museum of the Marine Corps will feature two opportunities for making dog tags. One will be an antique maker for display and special occasion use, and the other for every-day production. We plan to have a wall of "used" dog tags behind the equipment; therefore, we will need a large number of them. If you wish to donate a dog tag (it will NOT be returned) to be permanently displayed on the wall, send it to:

Dog Tag Wall  
c/o Museum Shop  
18723 Fuller Heights Road  
Triangle, VA 22172