

2022 Annual Report



Dear HMI Community,

2022 was a year of energy, implementation and strategic introspection at HMI.

We had a very successful year in program delivery hosting more Workshops, Open Gate Field Days, webinars and online training than in 2021. With the help of the global network of Certified Educators (CEs), HMI provided in-depth training for 3,947 individuals, presentations and/or webinars for another 10,524 impacted for a total of 14,471 served in 2022 with 17,249,522 acres impacted. Of the 158 scholarships awarded, 90 supported historically underserved communities (e.g., low-income, females, persons of color, and veterans). The REGENERATE Conference had 582 participants from 40 states and 8 countries connecting either in person or online. Over 38,000 persons follow HMI on social media and the circulation of HMI's *IN PRACTICE* journal is 5,600.

The success of our in-person events is powered by the caliber of the exceptional holistic managers who host these events. Thanks to all who hosted, spoke at, collaborated on, and contributed to HMI's learning and practice in 2022. Thanks to all who participated in a learning event and took steps to advance Holistic Management and regenerative agriculture. Finally, to our donors, grant makers, and scholarship providers, thank you for making these learning experiences rich and rewarding for everyone who participates.

On a strategic level our board and staff have spent time refining our Holistic Goal with particular attention to HMI's Statement of Purpose. This has been a learning experience for staff and board alike. While this work continued in 2023, we are feeling empowered by the focus and clarity it provides. HMI's Statement of Purpose is to advance the knowledge and practice of Holistic Management globally. The prospect of raising our eyes to the global need for Holistic Management is particularly appealing and we are well placed to explore realistic opportunities given our enthusiastic, energetic and capable international board members. Thank you to all our board members for your passion, energy and valuable time!

In 2022 we have been working to mentor Certified Educator trainees and newly qualified Certified Educators—to expose, facilitate and support their ability to engage customers, present and facilitate learning. We look to do much more of this work on an ongoing basis. Adding the mentorship component to our already robust Educator Training Program is already paying off handsomely in better prepared educators to serve the Holistic Management community.

While our internal financial management is going well, thanks to our use of the Holistic Financial planning process, our investment portfolio reflects the performance of the market. Our endowments suffered significant losses through exposure to the stock markets. Our banking stock holding also reflects the challenges faced by regional banks due to changes in banking regulations. We are already proactively adjusting our 2023 operational financial management with the knowledge that our investment portfolio is not something we depend upon in the immediate future.

With our 40th year anniversary coming up in 2024, we look forward to amplifying our message, our relevance and our impact. We look forward to connecting with you in 2024.

With gratitude,


Wayne Knight

Wayne Knight
Executive Director



B. Owens

Bree Owens
Board Chair



Green Fields Farm near Rogers, Texas has been practicing Holistic Management and other regenerative agriculture practices since 2012 and the result has been greater drought resilience. According to holistic manager, Jonathan Cobb, "When the ambient temperature is 103 degrees F, our covered soil with green, deeply rooted plants reads 88 while the neighbors plowed field reads 155 degrees F. This helps us maximize all the rain we get to grow more forage, which helps us be more resilient even in drought conditions."

In 2022 HMI and our Certified Educators helped the regenerative agriculture community by achieving the following:

3,947
Persons Trained

*with an additional
10,524 persons
impacted*

17,249,522
Acres Impacted

**\$25,450 in
Scholarships
Awarded—
57% to historically
underserved
communities**

**99% of participants
recommend HMI
training with 93%
reporting increased
knowledge gain**

144
Collaborations





2022 Financials

SUMMARIZED STATEMENT OF ACTIVITIES	2022	2021
REVENUES		
Educational Programs	\$ 225,385	\$ 111,519
Publications	12,741	13,701
Partnership & Trust	66,725	-
Mineral Interests	377,591	226,027
Investment Income	60,612	69,795
Unrealized gain(loss) on Investments	(629,485)	125,629
Realized Gain (loss) on Investments	10,579	136,974
Unrealized gain(loss) on closely held stock	(385,397)	(5,860)
Miscellaneous Income	2,865	68,178
Grants	270,028	361,100
Contributions	69,829	55,307
In-kind	31,280	22,179
Consulting	600	-
Total Revenues	113,353	1,184,549
EXPENSES		
Program	625,891	492,159
General & Administration	254,113	201,815
Fundraising	54,303	46,289
Total Expenses	934,307	740,263
CHANGE IN NET ASSETS	(820,954)	444,286
Net Assets at Beginning of Year	5,406,777	4,962,491
Net Assets at End of Year	\$ 4,585,823	\$ 5,406,777
CURRENT ASSETS		
Cash and Cash Equivalents	\$ 1,008,076	\$ 814,915
Investments - Mutual Funds	2,863,502	3,353,333
Program Receivables	350	11,725
Prepaid Expenses	7,949	5,728
Inventory	4,782	4,782
Total Current Assets	3,884,659	4,190,483
PROPERTY & EQUIPMENT		
Property & Equipment	75,738	75,738
Less: Accumulated Depreciation	75,738	75,738
Net Property & Equipment	-	-
Other Assets		
Stock in closely held companies	365,657	751,055
Mineral interests	2,022,236	2,022,236
Less: Accumulated Depletion	1,617,677	1,516,565
Net Mineral Interests	404,559	505,671
Total Other Assets	770,216	1,256,726
Total Assets	\$ 4,654,875	\$ 5,447,209
CURRENT LIABILITIES		
Accounts Payable	38,133	9,292
Accrued Benefits & Tax Liability	27,832	28,340
Deferred Revenue	3,087	2,800
Total Current Liabilities	69,052	40,432
NET ASSETS		
Without Donor Restrictions	4,474,785	5,224,908
With Donor Restrictions	111,038	181,869
Total Net Assets	4,585,823	5,406,777
Total Liabilities & Net Assets	\$ 4,654,875	\$ 5,447,209

2022 GRANTS, SPONSORSHIPS, & DONATIONS

HMI would like to thank all of our donors whose generous contributions help make our work possible.

Stewards (\$50,000+)

Wallace Research Foundation
Dixon Water Foundation
The Community Foundation of San Benito County

Guardians (\$10,000+)

Anonymous
Thornburg Foundation
Martha Records & Rich Rainaldi
Regenerative Ag Foundation
L & L Nippert Charitable Foundation
Grasslans Charitable Foundation
Farm Aid Inc

Protectors (\$5,000+)

Clif Bar Family Foundation
Joy Law
Leigh & Charlie Merinoff
Lydia B. Stokes Foundation

Patrons (\$1,000+)

Armando J. Flocchini
Benjamin Bartlett
Betsy & Reeves Brown
Bobby & Linda Meuth
Bybee Foundation
Clint Josey
Genny Duncan
Jessie Kileen
Melinda Sims
Nancy Ranney
Pono Von Holt
Ron Chapman
Roy and Charlotte Ekland
Semrod Family Private Foundation
Spring Branch Ranch
Tom and Deborah McDaniel
TomKat Ranch Educational Foundation
Walter Lynn

Sustainers (\$250+)

Ann Adams
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Cameron Duncan
Charles & Jennifer Sands
Chris Grotegut
Corey Stephens
CS Cattle Company
Dana Bonham
Deborah Clark
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Ellen Heath
Erik Tucker
George Rodes
Jack & Zera Varian
Jack & Teresa Southworth
James & Geraldine Matthews
James & Carol Parker
Jim Shelton
Kent Reid
Larry Lempka
Laura & Regan Velasquez
Linda Meuth
Louis Hagener
Lowell & Mary Forman
Mary Etta Johnston
Mary N. Adams
McKinley and Rachel Smoot
Paul Ackley
Peter & Helen Schulze
Richard Teague
Rob Rutherford
Sterling Grogan
Susan Bunnell
Susie Hagemeister
Tracy Little
Wayne & Roxanne Eateringer
Wayne Knight

Friends (<\$250)

Anonymous

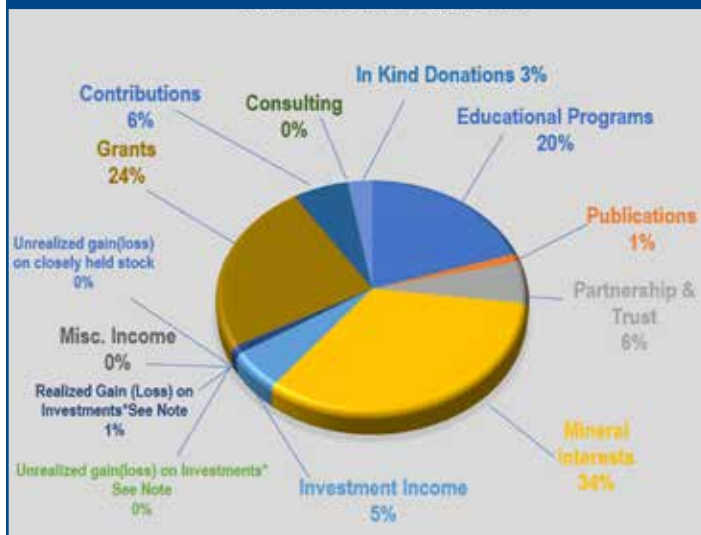
Art & Sally Roane
Arthur Young
Barbara & William Scaife
Ben Berlinger
Bre Owens
Carl Warrick
Carrie Stearns
Charles Schmidt
Cliff Schuette
Clifford Hawbaker
Dana McDaniel Bonham
Dave & Karen Baker
Dave Dorrance
Dave James
Dennis Pufpaf
Derek & Kirrily Blomfield
Diana Kay Speer
Don and Randee Halladay
Donald Whitten
Doreen Murphy
Edward Shobe
Emil & Maryann Casciano
Emma Brown-Shaklee
Greg Edelen
Hamilton Brown
Jackie Thompson
James & Carol Faulstich
Jason Bradley
Jason Klinge
Jean Larson
Jennifer Peotter
Jennine Nash
Jimmy Garner
Joe and Peggy Maddox
Joe Glode
Joe Morris
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John Wernette
Jonathan Cobb
Joseph Ranney
Judith McGeary
Keith & Dorothy Mack
Ken Fulton
Kevin Fulton
Larry Johnson
Lila McNeil
Linus Meyer
Lowry McAllen
Lynn Rakin
Mark Kiser
Michelle Stephenson
Myra McPherson
Network for Good
Oris Salazar
Penelope Powell
Peter Donovan
Rick Kaesebier
Rick Robbins
Rita Talbot
Roland and Brenda Kroos
Shipwheel Cattle Feeders Ltd.
Stephen Williams

Sterling Grogan
Steve Dorrance
Tracine Bevans
Thomas Mann
US Charitable Gift Trust

A special thanks to the following organizations and individuals who have graciously supported our programs.

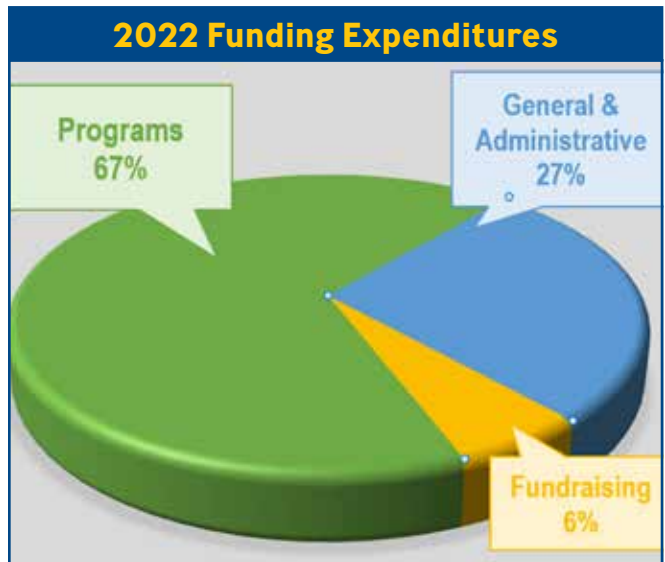
11th Hour Foundation
3R Ranch
Abby Boyd
Agricultura Network
AgRisk Advisors
AIRE
Allen Williams
American Grassfed Association
Ariel Greenwood
Arriola Sunshine Farm
Audubon Conservation Ranching
Audubon Tx
Audubon NM
Audubon Rockies
Badger Creek Ranch
Ben Berlinger
Bernalillo County Extension NMSU
Bernalillo County Open Space
Bill Harvey
Biological Capital
Bird Conservancy of the Rockies
Birdwell & Clark Ranch
Boudro Enterprises
Boulder County Open Space
Brad Schmidt
Brett Gray Ranch
Brett Riley
Bureau of Land Management
New Mexico
Bytable
Cactus Feeders
Carol M. Petrie Foundation
Casey Wade
Casper Farms
Center of Excellence for Hazardous Materials
Central Colorado Conservancy
Cindy Dvergsten
Chico Basin Ranch
Chispas Farm
Coldharbour Institute
Coldharbour Regenerative Network
Colin Nott
Colorado Carbon Fund
Colorado Cattlemens Agriculture Land Trust
Colorado Cattlemens Association
Colorado Coalition to Enhance Working Lands
Colorado Collaborative for Healthy Soils
Colorado Conservation Tax Credit Transfer

2022 Income Sources



Colorado Conservation Tillage Association
 Colorado Department of Agriculture
 Colorado Department of Agriculture Conservation Services
 Colorado Fruit & Vegetable Growers Association
 Colorado Land Link
 Colorado Open Lands
 Colorado Section of the Society for Range Management
 Colorado State Forest Service
 Colorado State Land Board
 Colorado State University Extension
 Colorado Water Center
 Colorado Water Conservation Board
 Community Consensus Institute
 Corey Stephens
 Christine Martin
 CrossRoads Ranch Consulting
 Cruces Creatives
 CS Cattle Company
 Ciudad Soil and Water Conservation District
 Cynthia James Stewart
 Dan Ginter
 Daniel Oppenheimer
 David James
 David Phillips
 Deborah Clark
 Del Cielo Farm
 Dixon Water Foundation
 Don Campbell
 Dry Creek Livestock
 Ducks Unlimited
 EcoAgriculture Partners
 Elizabeth Marks
 Eubanks Ranch
 Farm and Ranch Freedom Alliance
 Farm Credit of NM
 Farm to Table NM
 Flower Hill Insitute
 Flying Diamond Ranch
 Frank Davis
 Gabe Brown
 Gerardo Bezanilla
 Globetrotter Foundation
 Grandin Livestock Systems
 GrassRoots Carbon
 Graze the Prairie
 Greg Judy
 Green Spark Ventures
 Ground Up Consulting
 Grow the Growers Program
 Guidestone Colorado
 Gunnison Climate Working Group
 Gunther Ott
 Hand for the Land
 Hill Country Alliance
 Hill Country Conservancy
 Indian Nations Conservation Alliance
 Inside-Outside Management
 Institute for Applied Ecology

Interbasin Compact Committee
 ISA TanTec
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 James Ranch Grill & Market
 James Ranch Homestead School
 Jenn and Joe Wheeling
 Jeremiah and Maggie Eubank
 Hearth, Sol, Wind Ranch
 Jozua Lambrechts
 Julie James Ott
 Kara Kroger
 Kelly Sidoryk
 Kinsey Ag Services
 Kirk Gadzia
 L&L Nippert Foundation
 Larry Dyer
 Laura Velasquez
 Lauri and Dave Celella
 Levi Kokes
 Lewis Family Farm LLC
 Linda Pechin-Long
 Log Cabin Livestock Farm
 Louis Martin
 Mad Agriculture
 Mantere Farm
 Markegard Family Grass fed
 Martha Records & Rich Rainaldi
 Mat Moten
 May Ranch
 Merrill Lynch
 Michael "Storm" Casper
 Mirr Ranch Group
 National Bison Association
 National Capitalism Solutions
 National Center for Appropriate Technology
 National Young Farmers Coalition
 Natural Resources Conservation Service/Grazing Lands Coalition Initiative
 New Mexico Association of Conservation Districts
 New Mexico Coalition to Enhance Working Lands
 New Mexico Department of Agriculture
 New Mexico Farmers Marketing Association
 New Mexico First
 New Mexico Forest & Watershed Restoration Institute
 New Mexico Game & Fish
 New Mexico Healthy Soils Working Group
 New Mexico House of Representatives
 New Mexico Land Conservancy
 New Mexico Land Trust
 New Mexico State Land Office
 New Mexico State University Extension
 NMSU Institute for Sustainable Agricultural Research
 Noble Research Institute
 No Regrets Initiative



North Central Texas College
 Northern Water
 Not Forgotten Outreach
 No-Till Texas
 Ollin Farms
 Ogalalla Commons
 Paicines Ranch
 Partners for Fish and Wildlife
 Pasture Map
 Phil Metzger
 Phillip Boyd
 Poetry Dorpers
 Polks Folly Farm
 Preston Sullivan
 Pueblo of Santa Ana
 Pueblo of Santa Ana Department of Natural Resources
 Pure Pastures
 Ralph Tate
 Ranchlands Chico Basin Ranch
 Ranney Ranch
 Regen Ag Lab
 Resource Management Services
 Rio Grande Agricultural Land Trust
 Rio Grande Joint Venture
 Rocky Mountain Farmers Union
 Rough Stone Ranch
 Round River Resource Management
 Ryan Gould
 San Juan Ranch
 San Luis Valley Local Foods Coalition
 San Luis Valley Soil Health Group
 Savory Institute
 Seth Wilner
 Silver Sustainability Strategies
 Silverleaf Farm
 Soil for Water
 Soil Health Services
 Southwest Energy Institute
 Southwest Grassfed Livestock Alliance
 Stockman Grassfarmer
 Storm Casper
 Succession
 Sul Ross State University
 Sustainable Growth Texas
 Sweet Grass Coop
 Taos Land Trust
 Tecovas Foundation
 Tesuque Pueblo Farm
 Texas A&M Agrilife Extension
 Texas Land Conservancy
 Texas Parks & Wildlife
 Texas Wildlife Association
 The Brett Gray Ranch
 The Citizen Science Soil Health Project
 The Grants Collective
 The Nature Conservancy
 The Quivira Coalition
 The Regen Ranch
 Thomas Schroeder
 Thornburg Foundation
 Three Sisters Kitchen
 Tierra Sagrada Farm
 Tom Sidwell
 Tomkat Ranch Educational Foundation
 Trainor Cattle Company
 Tuda Libby Crews
 Twin Mountain Fence
 University of Colorado Boulder
 University of New Mexico Sustainability Studies Program
 United States Department of Agriculture
 USDA Natural Resources Conservation Service
 United States Forest Service
 Upper Arkansas Conservation District
 Utah State University
 Vermejo Park Ranch
 West Texas A&M
 Western Landowners Alliance
 Whole New Concepts
 William Burnidge
 Will Harris
 Zia Queen Bees

The Jeffers Cattle Company, owned by father Jaime Jeffers and Marcos Jeffers, is situated in the northwest corner of Chihuahua, Mexico near Tapiecitas. The family has been practicing Holistic Management since 1985. With engaged management, they have increased forage production, built in a 90-day reserve for drought and gained higher utilization—all with benefits to the land.



2022 Board of Directors

- Walter Lynn, Chair – Illinois
- Jim Shelton, Vice Chair – Oklahoma
- Delane Atcitty – New Mexico
- Alejandro Carillo - Mexico
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- Daniel Nuckols – Texas
- Breanna Owens – California
- Brad Schmidt – South Dakota
- Kelly Sidoryk – Alberta, Canada
- Casey Wade – Texas
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- Brian Wehlburg – New South Wales, Australia
- Seth Wilner – New Hampshire

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- Dr. Ann Adams – Education Director
- Carrie Stearns – Director of Communications & Outreach
- Marie Von Ancken – Program Manager
- Dana McDaniel Bonham – Grants & Program Manager
- Oris Salazar – Program Assistant

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- Ron Chapman – Georgia
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- Alisa Gravitz – Washington, D.C.
- Will Harris – Georgia
- Clint Josey – Texas
- Greg Judy – Missouri
- James Parker – Colorado
- Carter Randolph – Ohio
- Allen Williams – Mississippi



“Being a part of the Holistic Management class has opened my eyes to a lot of things I never thought I could access. The class was packed with so much knowledge and history it exceeded my expectations. It was very informative about the process of running any business. The class was amazing! So much knowledge. Thank you again.”

— Natasha Anderson, Baltimore, MD

Please Help Us Grow

As a non-profit organization, HMI is always grateful for donations in support of our mission. Visit our website at www.holisticmanagement.org or phone our Development Department at 505-842-5252 to find out how you can contribute.



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hmi@holisticmanagement.org

Join the conversation:



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