



# 2020 Annual Report





Dear HMI Community,

2020 will be remembered as the COVID year. It was a challenging year for many, including HMI, but it will also be remembered as a year of pivoting, realizing new opportunities, and adapting. The practice of Holistic Management has helped us make the most of the challenges.

To be successful in our regenerative practices, we have learned that it is critical to also focus attention on the human aspects of management. The way each person approaches the challenges that face us personally, and the earth's environment, will determine humanity's future. Humanity's success or failure will come down to the quality of decisions we make individually and collectively. HMI can impact many more peoples' abilities to make better decisions.

That is why during 2020, our Board of Directors revised HMI's mission to define our focus as: "To envision and realize healthy, resilient lands and thriving communities by serving people in the practice of Holistic Decision Making & Management."

To achieve our mission, a key priority will be to **make Holistic Management easier for more people to learn and practice**. We will accomplish this by broadening our reach through online training, while supporting depth of practice through programs such as Workshops, Field days, One-on-One producer training, and through our Regenerative Agriculture Mentor Program (RAMP).

Our Certified Educator community is a cornerstone of HMI's success. These dedicated and passionate individuals extend HMI's reach. They also continue to influence our curriculum content and training methodology. Together with our Certified Educator community HMI's 2020 reach and impact included training 10,418 people as well as influencing 7,414,467 acres in a challenging year.

Thank you to all our supporters, our staff, Certified Educators, board, funders, advisory council, and collaborators for sustaining this remarkable organization, HMI.

A special word of thanks to Ann Adams who has led HMI as Executive Director through thick and thin since 2013. Ann is incredibly capable, and her courage, energy and passion have shaped this wonderful organization. We are so grateful that Ann will continue to work with us at HMI as Director of Education as we navigate the future.

We look forward to working with our entire community as we refine our materials, inspire and support our network and achieve the healthy land, produce the healthy food and foster the healthy lives we all want and need.

With gratitude,

*Wayne Knight*



Wayne Knight  
Interim Executive  
Director

*Walter Lynn*



Walter Lynn  
Board Chair



# HMI 2020

**6** RAMP mentor groups with  
**84** individuals & **45** businesses

**116**  
days of  
training

**375**  
online conference  
attendees

**10,418**  
people trained

**\$17,250**  
in scholarships  
awarded

**106**  
collaborations

**7,414,467** acres influenced



[www.holisticmanagement.org](http://www.holisticmanagement.org)



## 2020 Financials

<b>Summarized Statement of Activities</b>	<b>2020</b>	<b>2019</b>
<b>REVENUES:</b>		
Educational Programs	63,250	75,324
Publications	13,015	19,982
Partnership & Trust	33,272	54,044
Mineral Interests	58,466	168,109
Investment Income	22,952	26,312
Unrealized gain (loss) on Investments	228,657	313,467
Realized Gain (loss) on Investments	66,082	(19,379)
Unrealized gain (loss) on closely held stock	40,564	77,961
Miscellaneous Income	42,850	1,075
Grants	359,000	286,500
Contributions	50,266	49,851
In-kind	34,366	36,610
Consulting	6,650	36,793
Total Revenues	<u>\$1,019,390</u>	<u>\$1,126,649</u>
<b>EXPENSES:</b>		
Program	464,574	464,311
General & Administrative	210,894	162,131
Fundraising	12,649	2,800
Total Expenses	<u>\$688,117</u>	<u>\$629,242</u>
Change in Net Assets	331,273	497,407
Net Assets at Beginning of Year	4,631,218	4,133,811
<b>Net Assets at End of Year</b>	<b><u>\$4,962,491</u></b>	<b><u>\$4,631,218</u></b>
<b>Summarized Statement of Financial Position</b>		
<b>CURRENT ASSETS:</b>		
Cash and cash equivalents	821,610	691,970
Investments – Mutual Funds	2,777,397	2,533,754
Program Receivables	55,910	21,456
Prepaid Expenses	6,916	9,216
Inventory	4,782	6,486
Total Current Assets	<u>\$3,666,615</u>	<u>\$3,262,882</u>
Property & Equipment	75,738	75,738
Less: Accumulated Depreciation	75,738	75,668
Net Property & Equipment	<u>\$0</u>	<u>\$70</u>
<b>Other Assets</b>		
Stock in closely held companies	756,915	716,351
Mineral interests	2,022,236	2,022,236
Less: Accumulated Depletion	1,415,453	1,314,341
Net Mineral Interests	606,783	707,895
Total Other Assets	<u>\$1,363,698</u>	<u>\$4,687,198</u>
Total Assets	<u>\$5,030,313</u>	<u>\$4,687,198</u>
<b>CURRENT LIABILITIES:</b>		
Accounts payable	30,039	4,400
Accrued Benefits & Tax Liability	36,199	29,249
Deferred Revenue	1,584	1,755
Due to Merrill Lynch	0	20,576
Total Current Liabilities	<u>\$67,822</u>	<u>\$55,980</u>
Net Assets		
Without Donor Restrictions	4,873,314	4,512,599
With Donor Restrictions	89,177	118,619
Total Net Assets	<u>4,962,491</u>	<u>4,631,218</u>
<b>Total Liabilities and Net Assets</b>	<b><u>\$5,030,313</u></b>	<b><u>\$4,687,198</u></b>



## 2020 GRANTS, SPONSORSHIPS, & DONATIONS

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

### Stewards (\$50,000+)

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

### Guardians (\$10,000+)

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Martha Records & Rich Rainaldi  
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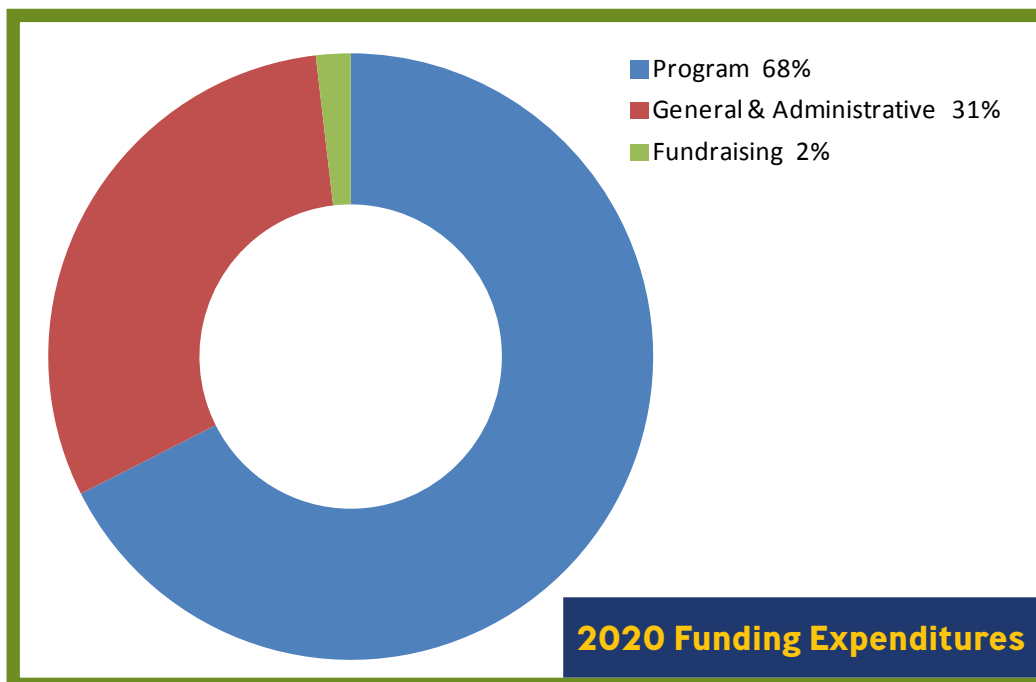
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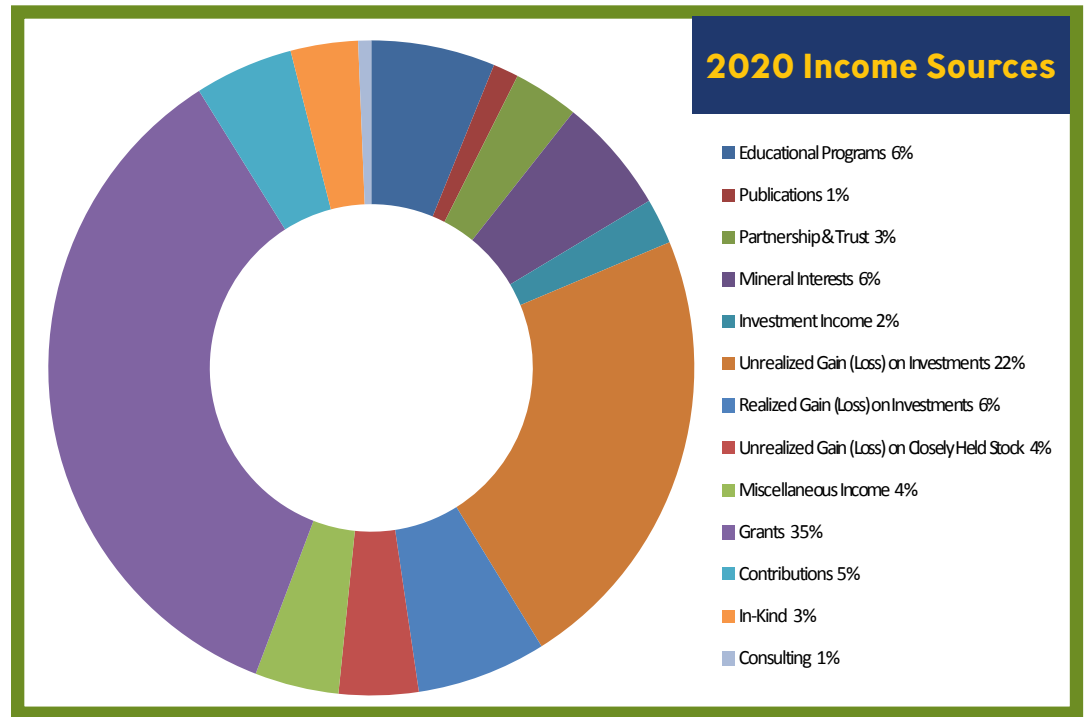
*A special thanks to the following organizations and individuals who have graciously supported our programs.*

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 Seth Wilner  
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 Tomkat Ranch Educational Foundation  
 Tuomas Mattila  
 Twin Mountain Fence  
 Wayne Knight  
 Western Landowners Alliance  
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 Will Harris





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

Join the conversation:



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Healthy Land. Healthy Food. Healthy Lives..

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