

# Annual Report 2014



## Dear HMI Community,

2014 was an exciting year for HMI. In addition to being HMI's 30th Anniversary, important advances were made including new leadership and a broadening and deepening of our programming in order to reach more people in areas such as California and Colorado. Thanks to the support of our generous donors, HMI was able to expand the number of Open Gate learning days and Whole Farm/Ranch Business Planning Workshops, and to engage the Holistic Management community in ways not possible in the past through our Getting Started Online Learning Series. We held the Holistic Management Rendezvous 2014 that brought together the Holistic Management community from around the world to celebrate 30 years of growth and to further the understanding of Holistic Management.

HMI ended 2014 with a strong financial position. The number of educational programs executed has almost doubled over 2013, but expenses have been streamlined and programs executed in an even more cost effective manner. Management has also pared down and streamlined administrative expenses, resulting in a reduction of over \$100K compared to 2013 expenses.

2015 is proving to be just as exciting a year for HMI. With a refocus of energy and a greater sense of direction, HMI is building on the successes of 2014 by increasing our impact. Key strategic emphasis is being placed on improving our communication in a way that resonates with more people, and a continuing extension of our programming by adding more Open Gates and other educational opportunities through work with our Holistic Management Certified Educator network, including our first international Open Gate to be held in New Zealand, as well as Open Gates in Australia, Canada and Mexico.

2015 is a foundational year that will take HMI to a new level that will allow us to more effectively execute our mission of educating



people to manage land for a sustainable future. This is a mission the HMI board and staff strongly believes in and we're excited to work with our network of Holistic Management Certified Educators to advance our mission. We invite those who share our passion for improving the quality of life of farm and ranch families, and for increasing the sustainability of agriculture, to partner with us in our effort to help sustainable agriculture communities thrive through the practice of Holistic Management.

Sincerely,

Ann Adams - Executive Director  
Holistic Management Certified Educator



Kelly Sidoryk - Board Chair  
Holistic Management Certified Educator



"This program has given me the courage, framework, tools, and network to become a small farmer. My awareness of the land has changed. I feel an amazing connection and sense of responsibility for bringing the land to a state of health. The network of fellow classmates is priceless. Most importantly, the Holistic Management model constantly reminds me to keep balance in my life on all levels."

**- Becky Scasta**

2013-2014 Beginning Farmers & Ranchers:  
Women in Texas program participant

## Audited Financials

### Summarized Statement of Activities

#### Revenues

	2014	2013
Professional services	0	1,200
Educational programs	112,100	64,206
Grants	214,276	264,635
Publications	42,405	54,203
Gas royalties	1,134,466	638,128
Contributions	139,034	156,551
Investment Income	112,675	92,498
Partnership & trust income	163,357	79,433
Miscellaneous income	3,266	6,139
Net realized gains on sale of investments	(8,214)	45,930
Unrealized loss on investments	(7,214)	(53,944)
<b>Total revenues</b>	<b><u>1,906,151</u></b>	<b><u>1,348,979</u></b>

#### Expenses

Professional services	0	1,957
Educational programs	657,459	596,375
Publications	52,378	70,829
Outreach	72,125	83,916
Gas royalties	275,221	222,133
Fundraising	51,587	96,274
Administration	309,050	447,124
<b>Total expenses</b>	<b><u>1,417,820</u></b>	<b><u>1,518,608</u></b>

#### Change in Net Assets

**488,331**      **(169,629)**

### Summarized Statement of Financial Position

#### Assets

Cash and cash equivalents	750,362	246,044
Investments	1,925,398	1,847,741
Accounts receivable	220,296	169,809
Prepaid expenses	17,860	23,680
Unconditional promises to give	7,250	7,250
Inventory	14,674	7,824
Property and equipment, net	36,968	51,880
Unconditional promises to give - long term	2,000	9,500
Other	3,000	3,000
Stock in closely held companies	502,291	501,245
Mineral interest, net	1,213,453	1,314,565
<b>Total Assets</b>	<b><u>4,693,552</u></b>	<b><u>4,182,538</u></b>

#### Liabilities

Accounts payable	48,347	21,232
Accrued liabilities	19,050	22,418
Deferred revenue	11,965	13,029
<b>Total</b>	<b><u>79,362</u></b>	<b><u>56,679</u></b>

#### Net Assets

Unrestricted	2,464,574	2,774,255
Temporarily restricted	2,149,616	1,351,604
<b>Total</b>	<b><u>4,614,190</u></b>	<b><u>4,125,859</u></b>

#### Total Liabilities and Net Assets

**4,693,552**      **4,182,538**

## 2014 by the numbers

13,531  
Farmers & Ranchers  
Trained

37,500,000  
Acres Influenced

Eleven  
Open Gate Learning Days  
in the US

98%  
Beginning Farmers &  
Ranchers Program  
Participant  
Satisfaction Rate

112  
People from 12 Countries  
enrolled in our NEW  
Getting Started  
Online Learning Course

51,215  
People Learning about  
Holistic Management on  
our website





# Funders

It is always with great pleasure that we acknowledge the many individuals and organizations whose support is the lifeblood of our mission and our community.

## Stewards (\$50,000+)

Sallie Calhoun - The Christiano Family Fund, an advised fund of The Community Foundation for San Benito County  
USDA/NIFA BFRDP

## Guardians (\$10,000+)

Western SARE - Utah State University  
The Thornburg Foundation  
Jim & Carol Parker

## Protectors (\$5,000+)

David Elliott  
Farm Aid Inc  
Genevieve Duncan

## Keepers (\$2,500+)

Jeanne Calhoun  
San Francisco Foundation  
Clif Bar Family Foundation

## Patrons (\$1,000+)

Colorado Branch of Holistic Management  
Amy & Joseph Morel  
Joy Law  
Katherine Dickson  
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Ben & Denise Bartlett  
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Catherine Semrod  
Christopher & Laura Gill  
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## Sustainers (\$500+)

Roby Wallace  
Rocky Mountain Farmers Union  
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Farm Credit of New Mexico

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## Friends (<\$250)

Paul & Julie Sloan  
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The Nature Conservancy  
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 Mary Girsch-Bock

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Area Farm & Food Link  
 Ashmore Insurance  
 Bar Lazy S Ranch  
 Bendy Brook Farm  
 Betsy Ross Grassfed Beef  
 Dr. Bonnie Warnock  
 Blackwood Bounty Farm  
 Blackwood Educational Land Institute  
 Bloodnick Family Farm  
 Blue Point Conservation  
 Brian Wehlburg  
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 Chris Behr  
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 Connemara Conservancy  
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 Delana Lands  
 Dharma Lea Farm  
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 Dr. Kelly Reyna  
 Dr. Richard Teague  
 Edible Austin  
 Emerald Valley Fairy  
 Englebert Farms

Farm & Ranch Freedom Alliance  
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 Guy Glosson  
 Hamilton Heights Dairy  
 Heirloom Blooms – Lennie Archer  
 Highland Soil & Water Conservation District  
 Hill Country Alliance  
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 Kerr Wildlife Management Area  
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 Kristyn Harris  
 KYSU Demonstration Farm  
 Laird Foshay  
 La Montanita Coop  
 Land for Good  
 Laura Celella  
 Lauren Bradbury  
 Leo Ranch  
 Dr. Lisa Bellows  
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 Maine Agricultural Mediation Service  
 Maine Farm Service Agency  
 Maine NOFA  
 Maine NRCS  
 Maine Organic Farming & Gardening Assoc.  
 Marfa National Bank/Big Bend Banks, N.A.  
 Meadows Center for Water and the Environment  
 Mesquite Grove Farm  
 MicroLife  
 Mimms Ranch  
 Montesino Ranch  
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Moore Farms  
 Native Prairies Assoc. of Texas  
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 New Hampshire Dept. of Agriculture  
 New Hampshire Farm Bureau  
 New Hampshire NOFA  
 New Hampshire NRCS  
 New Hampshire Soil & Water Conservation Districts  
 New Mexico State University  
 North American Hair Sheep Assoc.  
 North Country RC & D  
 Northeast Organic Dairy Producers Association  
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 Pam Mitchell Gayler  
 Phil Metzger  
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 Running High Ranch  
 Rural Texas Innovators  
 Selah Bamberger Ranch  
 Seth Wilner  
 Small & Beginner Farmers of New Hampshire  
 Southern New Hampshire RC & D  
 Southwest Grassfed Livestock Alliance  
 Spring Creek Farm  
 Spring Forest Farm  
 Springwood Farm  
 Steve Dahlberg  
 Sustainable Food Center  
 Sustainable Growth Texas  
 Tablas Creek Vineyard  
 Tara and Tab Weaver  
 Texas & Southwestern Cattle Growers Assoc.  
 Texas A&M Agrilife  
 Texas Ag Land Trust  
 Texas Dept. of Agriculture

Texas NRCS  
 Texas Organic Farmers & Gardeners Assoc.  
 Texas Parks & Wildlife  
 Texas Range Minerals  
 Texas Riparian Association  
 Texas-Mexico Border Coalition  
 The Dixon Water Foundation  
 The Intervale Center  
 The San Francisco Foundation  
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 University of Maine Cooperative Extension  
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 USDA/Western SARE  
 Valencia Water and Soil Conservation District  
 Vermont NOFA  
 Wayne Knight  
 Wimberley Valley Watershed Assoc.  
 Women's Agricultural Network  
 Women's Agricultural Network – Maine  
 Women's Agricultural Network – Vermont







"I found the course to be a great introduction to Holistic Management. I have realized that Holistic Planned Grazing is not as big a step as I had first feared and should not cost anything other than brain power to implement."

-Johnnie Balfour

2014 Getting Started Online Learning program participant

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- Carrie Stearns - Manager, Communications & Outreach

**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](http://www.holisticmanagement.org) or phone our Development Department at 505-842-5252 to find out how you can contribute.



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