

# Annual Report 2015



Dear HMI Community,

2015 was an exciting year for HMI and our community. We made a major step forward to develop collaborative programming within our international community. We held 24 Open Gates in 5 countries and with the help of our Certified Educators we trained 8,000 people, influencing 5.6 million acres. We also had 178 farmers and ranchers enroll in our Getting Started Courses from 19 countries.

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 and Land Management Workshops and Beginning Farmer/Rancher Training programs as we provided numerous scholarships to those in need of financial assistance.

On the outreach front we continue to expand our reach and educate more people about Holistic Management and HMI. By the end of the year we had a 20% increase in most of our outreach goals including almost 10,000 Facebook fans and another 10,000+ Twitter followers. Almost 15,000 people subscribe to our e-letter and over 110,000 visitors visited our website.

While HMI finished 2015 with a net loss of \$301,000, it was due to over a \$500,000 reduction in investment income as compared to 2014. However, our significant surplus in 2014 of almost \$500,000 allowed us to still invest almost \$200,000 in new and increased programming in 2015, which enabled us to obtain the programming and outreach metrics noted above. We also were able to reduce our overheads from 22% in 2014 to 15% in 2015 for an even leaner, more effective operation.

2016 is proving to be another busy and productive year for HMI. As we approach our 32nd anniversary and our biennial Gathering in Paicines, California on October 14-16, 2016, we are experiencing a little bit of a makeover. Some of our network has already seen this change when they've gone to visit our website. If you haven't already, please go to [www.holisticmanagement.org](http://www.holisticmanagement.org) and see our newly redesigned website. We hope you find it inviting, attractive, and still a wealth of information about Holistic Management and the Holistic Management community.

As part of our redesign we worked with a national marketing firm to better articulate the message we want to share with the audiences we serve. What the marketing folks told us when they looked at our old website and talked to us about our mission



and programs was how impressed they were with the Holistic Management community, their passion for the work and their commitment to positive action to solve very complex problems. They helped us highlight that community so we can reach others who have not yet learned about how we can all make decisions that improve our communities.

On the program side we have doubled the number of international Open Gates and added two new countries, the United Kingdom and Namibia, for a total of 7 countries involved in our place-based programming, as well as already reaching over 1200 farmers and ranchers.

In 2016 we are working harder than ever to educate people in regenerative agriculture for healthy land and thriving communities. With our committed team of Board, staff, Advisory Council, Certified Educators and a passionate network of practitioners we can spread the practice of Holistic Management and touch more lives and landscapes for a better world.

Sincerely,

Ann Adams - Executive Director

Danny Nuckols - Board Chair



"I took the Holistic Financial Management class in the summer of 2016. My mom also took the course and we worked on it together, with input from both families. The course literally changed the whole direction of both of our farms. We learned how to make more effective decisions and how to project income, expenses, and profit for each farm operation. We loved how we weren't just considering the numbers, but also the long-term holistic goal - that felt much more comfortable for us. I work for our local Conservation District, and we've been considering bringing Holistic Management trainings to our area. I can now wholeheartedly encourage other producers here to participate, in light of the learning I've appreciated so much. Thank you so much for offering such valuable information!"

— Terri Williams

## 2015 Audited Financials

### Summarized Statement of Activities

	2015	2014
Revenues		
Educational Programs	86,672	112,100
Grants	232,717	214,276
Publications	31,504	42,405
Mineral interests	707,535	1,134,466
Contributions	116,268	139,034
Investment income	35,661	112,675
Partnership and trust income	134,216	163,357
Miscellaneous income	2,630	3,266
Net realized gains on sales of investments	23,218	-8,214
Unrealized loss on investments	<u>-6,638</u>	<u>-7,214</u>
Total revenues	<u>1,363,783</u>	<u>1,906,151</u>
Expenses		
Educational programs	850,520	657,459
Publications	55,660	52,378
Outreach	150,398	72,125
Mineral interests	246,978	275,221
Fundraising	105,850	51,587
Administration	<u>256,371</u>	<u>309,050</u>
Total expenses	<u>1,665,777</u>	<u>1,417,820</u>
Change in Net Assets	<u>-301,994</u>	<u>488,331</u>

### Summarized Statement of Financial Position

Assets		
Cash and cash equivalents	701,555	750,362
Investments	1,919,739	1,925,398
Accounts receivable	121,548	220,296
Prepaid expenses	21,396	17,860
Unconditional promises to give	775	7,250
Inventory	11,542	14,674
Property and equipment, net	25,079	36,968
Unconditional promises to give - long term	1,000	2,000
Other	3,000	3,000
Stock in closely held companies	534,287	502,291
Mineral interest, net	<u>1,112,342</u>	<u>1,213,453</u>
Total Assets	<u>4,452,263</u>	<u>4,693,552</u>
Liabilities	53,092	48,347
Accounts payable	22,317	19,050
Accrued liabilities	<u>64,658</u>	11,965
Deferred revenue	<u>140,067</u>	<u>79,362</u>
Total Liabilities		
Net Assets		
Unrestricted	2,499,926	2,464,574
Temporarily restricted	<u>1,812,270</u>	<u>2,149,616</u>
Total Net Assets	<u>4,312,196</u>	<u>4,614,190</u>
Total Liabilities and Net Assets	<u>4,452,263</u>	<u>4,693,552</u>

5.6 Million Acres Influenced in 2015  
8,000 People Trained Worldwide



178 people from 19 countries enrolled  
in HMI's Online and Distance  
Learning Classes

104 farmers and  
ranchers participated  
in HMI's  
Whole Farm/Ranch  
Business Planning  
Series

51 farmers and  
ranchers participated  
in HMI's  
Whole Farm/Ranch Land  
Management Series

131 Beginning Women Farmers  
Trained in Seven States

92% of program participants  
experienced knowledge change as  
a result of the training

24 Open Gate Events in  
5 Countries:

- ◆ United States
- ◆ Canada
- ◆ Australia
- ◆ Mexico
- ◆ New Zealand

922 Open Gate  
Participants in 2015

# Funders

A heartfelt THANK YOU to the organizations whose generous contributions have helped to make our work possible.

## Stewards (\$50,000+)

The Christiano Family Fund  
USDA/NIFA BFRDP

## Guardians (\$10,000+)

The Cynthia & George Mitchell Foundation  
Thornburg Foundation  
Threshold Foundation  
Western SARE – Utah State University

## Protectors (5,000+)

Genevieve Duncan

## Keepers (2,500+)

Clif Bar Family Foundation

## Patrons (1,000+)

11th Hour Project  
Armando J. Flocchini III  
Ben & Denise Bartlett  
Clint & Betty Josey  
Dan Nuckols  
Don & Randee Halladay  
Emry Birdwell & Deborah Clark  
Gail Hammack & Doug McDaniel  
Joan Bybee  
Joy Law  
Laura Gill

Linda & Bobby Meuth  
Mayette Johnston  
Rocky Mountain Farmers Union  
Ron Chapman  
Susie Hagemester  
TomKat Ranch Educational Foundation

## Sustainers (\$500+)

Alice Ball-Strunk  
Belva Locker  
Byron & Wayne Eatinger  
G Rodes  
Gail Kursel  
Hugh B. Garnett Jr.  
Jim & Sara Shelton  
Kelly Sidoryk  
Kent Reid  
Linda K James  
Linda Museus  
Mary N. Adams  
Noah Small  
Pono & Angela Von Holt  
Ryan Jarvis  
Sebastian & Kelly Stadler  
Walt & Dianne Davis  
William S. & Tracy Little

## Supporters (250+)

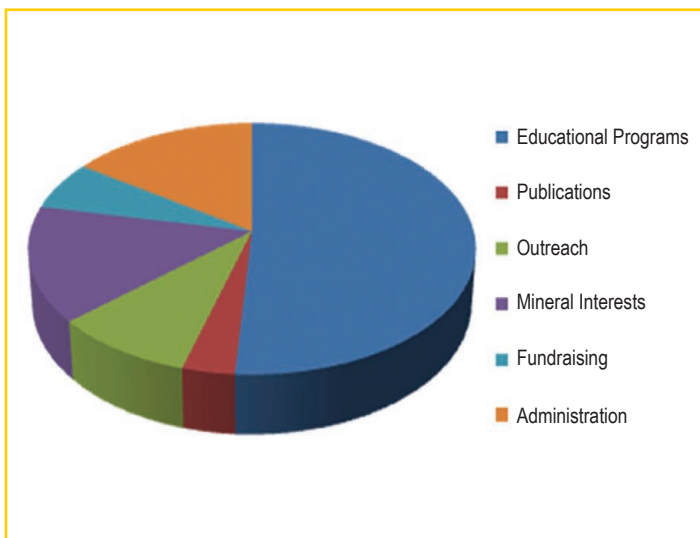
Ann Adams

Björn Fallström  
Clifford & Mary Ann Borgelt  
Jaye Henneke  
Kathy Harris  
Lowell & Mary Forman  
M.K. & Veronica Campbell  
Nancy Levi Ranney  
Peninsula Open Space Trust  
Pete & Linda Hutton  
Peter Schulze  
Rob & Martie Rutherford  
Scott Sims & Family

## Friends (<\$250)

Adrian Callender  
Adrian Favis  
Alejandro Tizatl Juarez  
Alfred (Chip) Chenoweth  
Alisa Gravitz & Joe Garman  
Andrey Sobkalov  
Anita Ramos & Reid Folsom  
Art & Leslie McElroy  
Barbara & William Scaife  
Ben Berlinger  
Bruce & Lisa Rickard  
Bryan Wehrli  
Candace Burns  
Carl D Warrick  
Carrie Stearns  
Carrizozo SWCD  
Charles & Peggy Schmidt  
Charles Garrett  
Claire Anderson  
Clifford Hawbaker  
Clint Walker  
Cynthia Villa  
Dana Lydon  
Dave Maxwell  
Dave Waters  
Dee Ann Henneke  
Denise Bostdorff & Daniel O'Rourke  
Derek & Roberta Meader  
Derek Blomfield  
Don (Roc) & Judy Rutledge  
Don Faulkner  
Douglas Dockter  
Edwin Waters  
Elizabeth West  
Elizabeth Wheeler  
Gary Gilbert  
Gary Henneke  
Genevieve Cran  
George Whitten  
George Work  
Glynn Schanen  
Greg Glenn  
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Jack & Teresa Southworth  
James & Geraldine Matthews  
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Jennifer Peotter  
Jeremy & Jodi Peake  
Jerry Kitt  
Jim & Barbara Long  
Jim & Gerry Rackley  
Joan Kelleher  
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John & Julie Ott  
John & Pamela Trent  
John G. Hackley  
John Wernette  
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Ken Gallard  
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Kevin Fulton  
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Robin Acton  
Robina Satchwell  
Sally Gamauf  
Sally Wellborn & William Gallagher  
Samantha Lapin  
Sandra Langelier  
Sarel J L Marais  
Spencer Martin  
Stacey Sullivan



How 2015 Funds Were Spent

Stacy Maurer  
 Stephanie Cloutier  
 Stephanie Von Ancken  
 Steve Dorrance  
 Sue and Don Gilbert  
 Thom McAllister  
 Tom & Irene Frantzen  
 Valerie Grubbs  
 Vivianne Holmes  
 W.L. Holmes  
 Walter Lynn  
 William Jenkins  
 William Jonsson

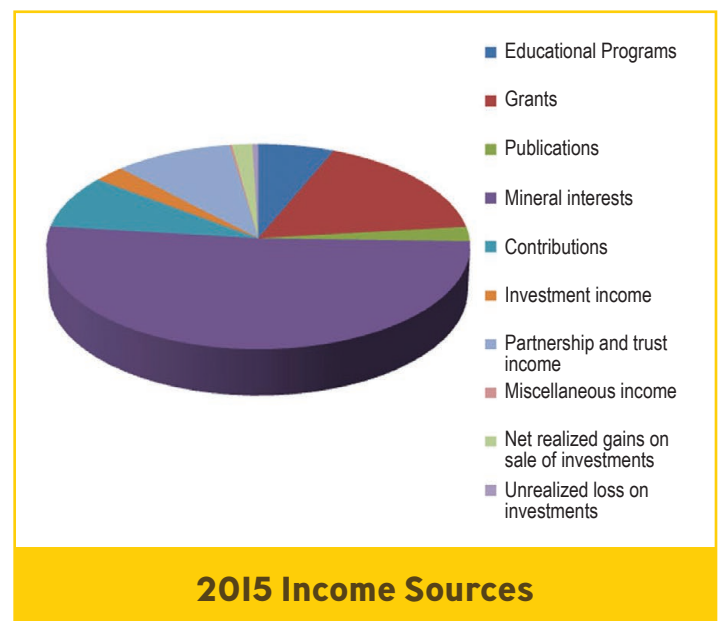
*A special thanks to the following organizations and individuals who have graciously supported our programs.*

11th Hour Project  
 All We Need Farm  
 Animal Welfare Approved  
 Area Farm & Food Link  
 Australian Government Extension  
 Avila Valley Barn  
 Barking Cat Farms  
 Bat Conservation International  
 Berkshire Grown  
 Canadian Forage & Grassland Association  
 Carne 47  
 Carrizozo Soil & Water Conservation District  
 CD & Bobby Pounds  
 Center for Environmental Research  
 Central New York RC & D  
 Claunch-Pinto Soil & Water Conservation District  
 Community Involved in Sustaining Agriculture (MA)  
 Connecticut Dept. of Agriculture  
 Connecticut Natural Resource Conservation Service  
 Cornell University  
 Corpus Christi Downtown Farmers Market  
 Craig & Claire Kapernick  
 Dallas Farmers Market  
 Dancing Bee Winery  
 Dave James  
 Day Springs Farm  
 Debbie & Don Davis  
 Debbie Smith  
 Dixon Water Foundation  
 Ducks Unlimited Canada  
 Dunblane Farm  
 Eastern Connecticut RC & D  
 Edible Austin  
 Erik & Doniga Markegard  
 Faith Hollow Ranch  
 Farm & Ranch Freedom Alliance  
 Farm Aid  
 Farm Grange School  
 Fig Trees Organic Farms  
 Fort Bend County Extension

Glen Orton Farm  
 Glenrock Farm  
 Good Roots Garden  
 Greencover Seed  
 Greg & Rachel Hart  
 Hill Country Alliance  
 Jackson Soil & Water  
 Jake Smith  
 James Ranch  
 John Stigge  
 Jonathan Cobb  
 Judi Earl  
 Kane Veterinary Supplies  
 Kerr Wildlife Management Area  
 Kim Martin  
 King's Mark RC & D  
 La Cosecha CSA  
 La Montanita Co-op  
 La Plata Open Space Conservancy  
 Land for Good  
 Laurie Bostic  
 Lives  
 Lucends Farm  
 Maine Agricultural Mediation Service  
 Maine Farm Service Agency  
 Maine NOFA  
 Maine NRCS,  
 Maine Organic Farming & Gardening Assoc.  
 Mangarara Station  
 Markegard Farm  
 Massachusetts Department of Agriculture  
 Massachusetts Northeast Organic Farming Association (NOFA)  
 Nancy Ranney  
 National Grazing Lands Coalition  
 Native Prairies Assoc. of Texas  
 Natural Grocers  
 NCAT  
 New Connecticut Farmer Alliance  
 New England Small Farm Institute  
 New Hampshire Dept. of Agriculture  
 New Hampshire Farm Bureau  
 New Hampshire NOFA  
 New Hampshire NRCS  
 New Hampshire Soil & Water Conservation Districts  
 New Mexico Association of Conservation Districts  
 New Mexico Game & Fish  
 New Mexico NRCS  
 New York NRCS  
 NMSU  
 NMSU Extension  
 North American Hair Sheep Assoc.

North Country RC & D  
 NRCS Texas  
 Pacific Organics  
 Paddy & Liz Reynolds  
 Panorama Meats  
 Peach Trees  
 Peninsula Open Space Trust  
 Pines & Prairies Land Trust  
 Piojo Ranch  
 Rancho El Represo Del Verde  
 Ranney Ranch  
 Raven Lukehart  
 Richards Family Farm  
 River Systems Institute  
 Rocky Mountain Farmers Union  
 Ross Farm  
 Rural Texas Innovators  
 Ruzicka Sunrise Farm  
 Saddle Butte Ag  
 San Mateo County Resource Conservation District  
 Sand Creek Farm & Dairy  
 Seco Valley Ranch  
 SG & R Farms  
 Small & Beginner Farmers of New Hampshire  
 Southeast Massachusetts Agricultural Partnership  
 Southern New Hampshire RC & D  
 Southwest Grassfed Livestock Alliance  
 Stacey Roussel  
 Stigge Farm  
 Sunnybrae Farm  
 Sustainable Food Center  
 Sustainable Growth, TX  
 Tamara Ranch  
 Texas & Southwestern Cattle Growers Assoc.  
 Texas A&M Agrilife  
 Texas Ag Land Trust  
 Texas AgriLife Research

Texas Dept. of Agriculture  
 Texas NRCS  
 Texas Organic Farmers & Gardeners Association (TOFGA)  
 Texas Parks & Wildlife  
 Texas Riparian Association  
 Texas-Mexico Border Coalition  
 The Christiano Family Fund  
 The Cynthia & George Mitchell Foundation  
 The Dixon Water Foundation  
 The Intervale Center  
 The Thornburg Foundation  
 TomKat Ranch  
 TomKat Ranch Education Foundation  
 Tracy & Bill Litle  
 Triple Cross Farm  
 TRM International  
 TX NRCS  
 University of Connecticut Extension  
 University of Maine Coop Extension  
 University of Massachusetts  
 University of NH Extension  
 University of Texas-Pan Am  
 University of Vermont  
 USDA/Western SARE  
 Valley Food Partnership  
 Vermont NOFA  
 Walker Honey Farm  
 Weston A. Price Foundation  
 Wimberley Valley Watershed Assoc.  
 Women's Agricultural Network – Maine  
 Women's Agricultural Network – Vermont  
 Women's Agricultural Network Connecticut





“We loved taking the “Getting Started to Holistic Management Course”. It has given us tools and refined tools that we already had to make our place more ecology friendly and to help us understand our management system better. “

— Tim and Karen Stevenson, Buffalo, SD

### Current Board of Directors

- Dan Nuckols, Director & Chair – Sherman, TX
- Walter Lynn, Director & Vice-Chair – Springfield, IL
- Kelly Sidoryk, Director – Alberta, Canada
- Ben Bartlett, Director – Traunik, MI
- Kevin Boyer, Director – San Rafael, CA
- Laura Gill, Director – San Antonio, TX
- Guy Glosson, Director – Snyder, TX
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- Jim Shelton, Director – Vinita, OK
- Gerardo Bezanilla, Director – Chihuahua, Mexico
- Kirriy Blomfield, Director – Quirindi, NSW, Australia
- Sarah Williford, Director – Walton, NY

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- Peggy Cole – Program Manager
- Kelly Curtis – Director of Finance & Operations
- Julie Fierro – Education Manager
- Mary Girsch-Bock – Development Manager
- Valerie Grubbs – Accounting Manager
- Kathy Harris – Program Director
- Jennifer Klass – Director of Development
- Carrie Stearns – Communications & Outreach Manager
- Stephanie Von Ancken – Office & Programs Assistant

### 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.

Join the conversation:



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