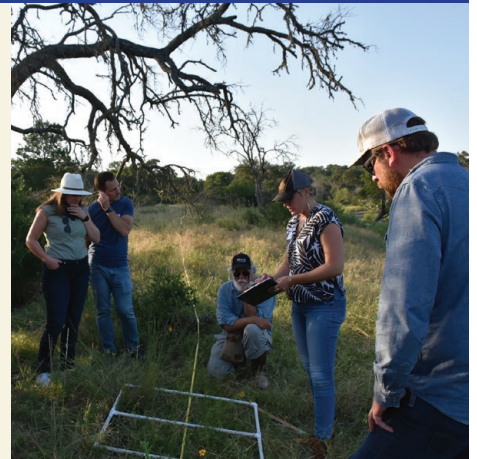




# 2019 Annual Report



Dear HMI Community,

2019 was a year of hard work that helped us build resilience for our organization. In an effort to put as much money towards programs as possible, we decided to sell our building and was able to accomplish that at the end of 2019, having all systems in place for a small rented office and all staff working remotely. Little did we know how much that resilience would be needed in 2020 with COVID19 and the economic challenges intensified by the virus.

HMI's board and staff continued on our focus on how to maximize program impact for dollar spent. With that focus we were able to increase our net assets without restriction to \$459,888, increasing our financial reserves by 33%. We also increased our gross program margin by 70%, and we decreased expenses by 23% with only 26% of our expenses allocated to administration.

Despite the focus on reducing overhead in 2019, HMI was still able to collaborate with over 90 organizations around the globe to deliver 61 days of programming. We also had 141 farmers and ranchers enroll in HMI's Getting Started Courses and other online training. HMI was also able to increase the total amount of scholarships to over \$27,000 to beginning and transitioning farmers and ranchers needing financial assistance. Overall HMI's programming and global network of over 65 Certified Educators trained and presented on Holistic Management to 5,957 people, while also positively impacting over 11.9 million acres.

On the outreach front, we continue to expand our scope by educating more people about Holistic Management and HMI. By the end of the year, our outreach outcomes included over 22,360 Facebook fans and 16,000+ Twitter followers with almost 19,000 people subscribing to our e-letter.

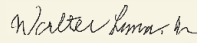
With the outstanding success of last year's REGENERATE Conference with over 500 people attending, we have already begun planning with the Quivira Coalition and the American Grassfed Association for the 2020 REGENERATE Conference. "Resilience in Times of Uncertainty" will be held online with a month long series of events leading up to the culmination events on November 19–20, 2020. We hope to see you all there as the opportunities to network with people around the world will be unparalleled with this new approach to the conference. There will be plenaries, breakout discussions, networking events, and opportunities to learn about innovative approaches that are helping people thrive in times of chaos.

The work and results achieved by our Board, staff, Advisory Council, Certified Educators, collaborators, and practitioners continues to inspire and humble us. We appreciate all those who are helping us fulfill our mission of creating healthy land and thriving communities through the practice of Holistic Management.

With gratitude,



Ann Adams - Executive Director



Walter Lynn - Board Chair



"This program has changed my perspective from the intense agriculture mindset that I received during university and I will continue to educate myself on Holistic Management to ensure my land and my business become more than just a hobby, but a healthy lifestyle for my family, my animals, and my land."

— 2019 New Agrarian Student



# 2019 Financials

<b>Summarized Statement of Activities</b>	<b>2019</b>	<b>2018</b>
<b>Revenue</b>		
Educational Programs	75,324	101,449
Publications	19,982	28,556
Partnership & Trust	54,044	108,381
Mineral Interests, net of 154,260 in production expenses	168,109	425,834
Investment Income	26,312	28,885
Unrealized gain(loss) on Investments (Note 3)	313,467	(237,976)
Unrealized gain(loss) on closely held stock (Note 7)	77,961	43,707
Realized Loss on Investments (Note 3)	(19,379)	—
Miscellaneous income	1,075	979
Grants	286,500	235,250
Contributions	49,851	52,475
In-kind (Note 12)	36,610	40,606
Consulting	36,793	14,639
<b>Total Revenues</b>	<b><u>1,126,649</u></b>	<b><u>842,755</u></b>
<b>Expenses</b>		
Program	464,311	551,119
General & Administrative	162,131	188,508
Fundraising (Note 13)	<u>2,800</u>	<u>29,900</u>
<b>Total Expenses</b>	<b><u>629,242</u></b>	<b><u>769,527</u></b>
<b>Change in Net Assets</b>	<b>497,407</b>	<b>73,258</b>
<b>Net Assets at Beginning of Year</b>	<b><u>4,133,811</u></b>	<b><u>4,060,553</u></b>
<b>Net Assets at End of Year</b>	<b><u>4,631,218</u></b>	<b><u>4,133,811</u></b>
<b>Summarized Statement of Financial Position</b>		
<b>Current Assets</b>		
Cash and cash equivalents (Note 2)	691,970	790,386
Investments – Mutual Funds (Note 3)	2,533,754	1,660,576
Program Receivables (Note 4)	21,456	7,311
Prepaid Expenses (Note 5)	9,216	9,569
Inventory	6,486	10,556
<b>Total Current Assets</b>	<b><u>3,262,882</u></b>	<b><u>2,478,398</u></b>
<b>Property &amp; Equipment</b>		
Property & Equipment (Note 6)	75,738	643,218
Less: Accumulated Depreciation (Note 6)	75,668	131,344
Net Property & Equipment	<u>70</u>	<u>511,874</u>
<b>Other Assets</b>		
Stock in closely held companies (Note 7)	<u>716,351</u>	<u>638,390</u>
Mineral interests (Note 8)	2,022,236	2,022,236
Less: Accumulated Depletion (Note 8)	1,314,341	1,213,230
Net Mineral Interests	707,895	809,006
Total Other Assets	<u>1,424,246</u>	<u>1,447,396</u>
<b>Total Assets</b>	<b><u>4,687,198</u></b>	<b><u>4,437,668</u></b>
<b>Current Liabilities</b>		
Accounts payable	4,400	8,519
Accrued Benefits & Tax Liability (Note 9)	29,249	31,237
Deferred Revenue	1,755	1,785
Property Tax Liability	—	25,182
Due to Merrill Lynch	<u>20,576</u>	—
Note Payable – Current Portion (Note 10)	—	<u>28,202</u>
<b>Total Current Liabilities</b>	<b><u>55,980</u></b>	<b><u>94,925</u></b>
<b>Long-Term Liabilities</b>		
Note Payable (less current portion) (Note 10)	—	208,932
Total Long-Term Liabilities	—	<u>208,932</u>
<b>Net Assets</b>		
Without Donor Restrictions (Note 11)	4,512,599	4,052,711
With Donor Restrictions (Note 11)	118,619	81,100
<b>Total Net Assets</b>	<b><u>4,631,218</u></b>	<b><u>4,133,811</u></b>
<b>Total Liabilities and Net Assets</b>	<b><u>4,687,198</u></b>	<b><u>4,437,668</u></b>



## 2019 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  
Thornburg Foundation

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

Anonymous  
Dixon Water Foundation  
Johnston Foundation (Martha Records & Rich Rainaldi)  
Regenerative Ag Foundation  
Tecovas Foundation  
Tides Foundation

### Protectors (\$5,000+)

Farm Aid Inc  
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Joy Law  
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Lydia B. Stokes Foundation  
TomKat Ranch Educational Foundation

### Patrons (\$1,000+)

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Joan Bybee  
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Mary Etta Johnston  
Montesino Ranch  
Ron Chapman  
Sunfire Ranch  
Susie Hagemeister  
The Nature Conservancy  
Tuomas Mattila  
Wally Olson

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Ann Adams  
Betsy & Reeves Brown  
Cindy Dvergsten  
Clove Valley CSA  
Community Foundation for a greater Richmond  
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Molly (Mary) Baldrige  
Pete Pulis  
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Roland Kroos

Sapbush Hollow Farm  
Walt Davis  
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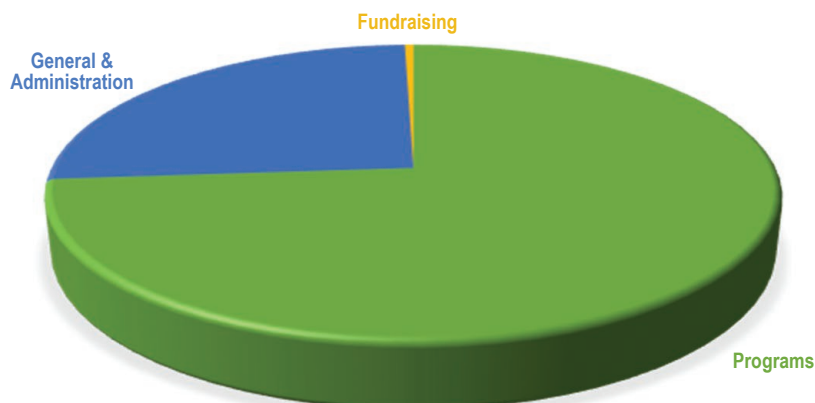
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Bert Rivera  
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Kathy Harris  
Kelly Sidoryk  
Kelly Jack  
Ken Klemm  
Kevin Boyer  
Peter Schulze  
Richard Teague  
Tena Farr

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Barbara & William Scaife  
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Dave Dorrance  
David Trombold  
Denise Bostdorff & Daniel O'Rourke  
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Derek & Kirrily Blomfield  
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Mike Turner  
Myron Dyrda  
Network for Good  
Oris Salazar  
Ozark Hills Insurance, Inc.

## 2019 Funding Expenditures



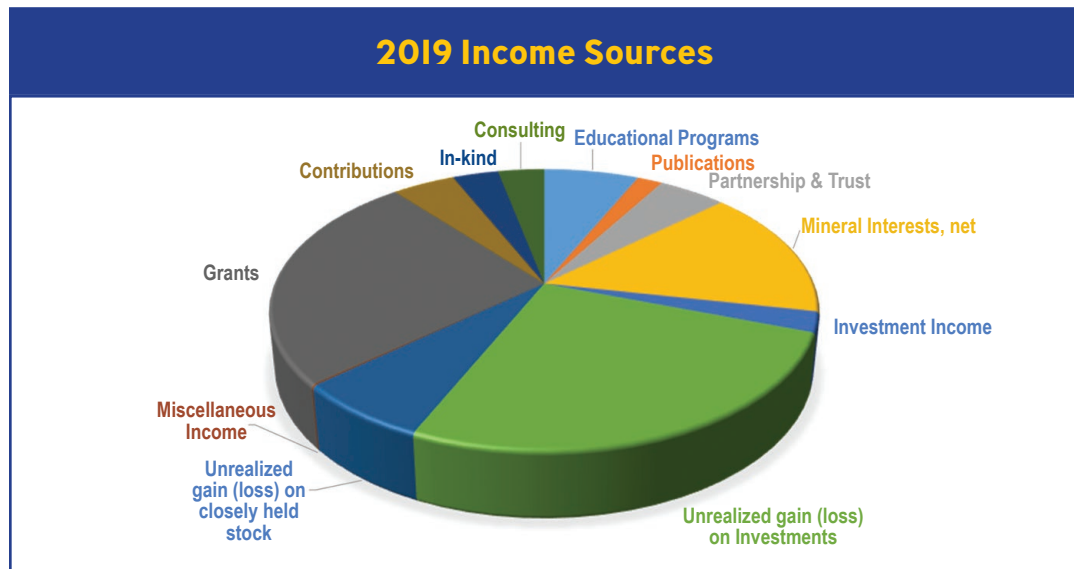


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 Vicky Holcomb  
 Wheeler County, Texas A&M  
 Agrilife Extension  
 Willard Heck

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

100<sup>th</sup> Meridian Ranching  
 4 Daughters Cattle Company  
 Agricultura Network  
 AIRE  
 Allen Williams  
 All Things Natural  
 American Grassfed Association  
 Amigos Bravos  
 Arapaho County Fairgrounds  
 Ariel Greenwood  
 Arriola Sunshine Farm  
 Audubon NM  
 Avery Anderson-Sponholtz  
 Badger Creek Ranch  
 Ballentine Family Foundation  
 Brad Schmidt  
 Bernalillo County Extension  
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 Birdwell & Clark Ranch  
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 Capital Farm Credit  
 Casey Wade  
 Christine Martin  
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Colin Nott  
 Colorado State Land Board  
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 Gerardo Bezanilla  
 Geoffrey & Stacie Morris  
 Greg Judy  
 Grow the Growers Program  
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 Jack Seed and Supply  
 Kevin Boyer  
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 Lisa Bellows  
 Dave & Lauri Celella  
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 Merrill Lynch  
 Mesa View Ranch  
 Moore County Agri-Life Extension  
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 Moore County Community Center  
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 Service/Grazing Lands Coalition  
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 New Mexico State University  
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 North Central Texas College  
 Not Forgotten Outreach  
 NRCS Extension Service  
 Ozark Hills Insurance  
 Pete Pulis

Punchy Cattle Company  
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 San Juan Ranch  
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 Southwest Grassfed Livestock  
 Alliance  
 Stockman Grassfarmer  
 Sustainable Growth Texas  
 Taos Land Trust  
 Tecovas Foundation

Texas A&M Agrilife Extension  
 Texas Parks & Wildlife  
 The Nature Conservancy  
 The Quivira Coalition  
 The Regen Ranch  
 Thornburg Foundation  
 Tom & Melissa Bookhout  
 Trainor Cattle  
 Twin Mountain Fence  
 UCONN College of  
 Agriculture  
 United Fiberglass Inc.  
 West Texas A&M  
 Western Landowners Alliance  
 Whole New Concepts  
 Wiggle Room  
 Wild Leaven Bakery  
 William Burnidge  
 Will Harris



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## Community (\$15,000+)

The HERD  
#NoRegrets Initiative and  
Paicines Ranch  
Regenerative Agriculture  
Foundation  
Thornburg Foundation

## Water (\$10,000+)

Grasslans Charitable Foundation  
TomKat Ranch

## Animal (\$5,000+)

11<sup>th</sup> Hour Project  
Audubon Conservation  
Ranching Program  
Greenacres Foundation  
Intertribal Agricultural Council  
Ranney Ranch

## Plant (\$2,500+)

Anonymous  
CS Foundation  
Old Town Farm  
Lydia B. Stokes Foundation  
MaiaGrazing  
Taos Ski Valley Foundation,  
an affiliate of the Moore  
Charitable Foundation, founded by  
Louis Bacon

## Seed (\$1,250+)

Robert and Mary Estrin,  
Lone Mountain Ranch  
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La Montañita Co-op Food Market  
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## Soil (\$500+)

Animas Foundation  
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## Mycelium (\$1+)

Mary Behrens  
Deborah Clark  
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Guy Glosson  
Paul Neubauer  
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## Food Donors

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Thousand Hills Lifetime Grazed  
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19,000  
e-newsletter  
subscribers

141  
enrolled  
in online  
courses

23%  
decrease  
in expenses

26%  
admin  
expenses

11.9  
million acres  
influenced

500  
conference  
attendees

16,000  
Twitter  
followers

5957  
people  
trained

\$459,888  
net assets  
without  
restrictions

90  
organization  
collaborations

\$27,000  
gifted in  
scholarships

61  
days of  
programming

70%  
increase  
in gross  
program  
margin

33%  
increase  
in financial  
reserves

65  
Certified  
Educators

22,360  
Facebook  
fans



Healthy Land. Healthy Food. Healthy Lives.®

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- William Burnidge – Colorado
- Sallie Calhoun – California
- Ron Chapman – Georgia
- Deborah Clark – Texas
- Alisa Gravitz – Washington, D.C.
- Will Harris – Georgia
- Clint Josey – Texas
- Greg Judy – Missouri
- James Parker – Colorado
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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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- Carrie Stearns – Director of Communications & Outreach
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- Oris Salazar – Program Assistant



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