

2019 Annual Report
Ernest C. Oberholtzer Foundation



MALLARD ISLAND IN RAINY LAKE

Four of Us Enjoying the Warmth of an Uncovered Outcropping, Gull Island in June

L to R: Beth Waterhouse, Michael Reid, Dave Rolloff, Nance Kunkel

IMAGE CAPTURED BY PEGGY ANNE SMITH

Organization incorporated in 1964, a 501(c)3 nonprofit and a private operating foundation

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“The Ernest C. Oberholtzer Foundation fosters and maintains Ober’s legacy and north woods island home as a source of inspiration, renewal, and connection to Indigenous Peoples, kindred spirits, and the natural world. ~ Gi-bezhig-oomin.”

Dear Friends of the Ernest C. Oberholtzer Foundation,



Author and University of Minnesota senior fellow, Richard Leider, declares that we are in a “transition revolution,” and says that one in three people are currently undergoing some sort of transformative change: divorce, new job, retirement, new care-giving relationships, etc. I believe it, and as I write this letter, the world is dealing with a virus that has changed us all. We are learning fast, and I hear people grappling with values that they may have left stagnant for years.

I’ve created (or tolerated) many transitions in my own life, and one particular time, after I settled on a “personal mission” that focused on *harmony in the human and Earth relationship*, doors began to open. Mallard Island added her voice and many lessons, and she continues to teach me year after year about that crucial goal of harmony. On Mallard, I commonly meet people who are in transition, whether that was “named” as a part of their island visit or not. And I’ve seen the light come on in face after face. Sometimes faces light up given the sheer *idea* of six days ahead on a tiny, semi-wild island. Sometimes it happens about Wednesday when they’ve been off their cell phones for days. The island teaches us—and we are all learning.

Foundation “happenings” in 2019 included excellent demo work on Gull Island to re-discover the beauty of remarkable boulders once under a shack and now warming in the light of day. (See cover photo!) Meanwhile, Mallard Island again served near capacity last summer with 124 people visiting there. The island sported a brand new front dock, and a notable archival achievement was the creation of a detailed database of Oberholtzer’s photography, some images taken nearly 100 years ago.

Our 2020 summer will hopefully welcome the second college age group now calling themselves “Stewards of the Wilderness II,” and a sweat lodge will appear (with the help of elders and others) on Crow Island, and so it continues—the islands and the Anishinaabe traditions continue to teach us.

We named our focus on Anishinaabe connections with more clarity and purpose five years ago. It was not until this winter, however, that we added one Anishinaabe word to our mission statement. You will see on the cover of this report that mission and that word, “Gi-bezhig-oomin,” which means “We are All One.” Humankind can learn quickly, and we can remember those almost-forgotten values—the ones that we need daily inside the transitions of our lives—knowing they can strengthen and undergird a re-commitment to a sustainable life. We are, indeed, *all one* in this island venture, as well as on our finite green and blue planet island, and I see more harmony ahead.

Beth E. Waterhouse ~ Executive Director

Accomplished by Everyone during 2019:

- ❖ Shack on Gull Island torn down and site cleaned all summer long to reveal a beautiful, natural meeting place.
- ❖ Three added Oberholtzer Foundation trustees now make up a group of twelve to govern the organization, oversee finances, and lead its committee and on-island work.
- ❖ Rosa Ebling visited the island in June, educating the board about our investments.
- ❖ Mallard Island summer schedule back up to the newly established capacity level.
- ❖ More trained caretakers, now most of whom have completed CPR and First Aid.
- ❖ Restoration of a beautiful arched doorway into Ober's old root cellar.
- ❖ Restoration of the original architectural detail of a balcony on Bird House.
- ❖ "Saving" Cedarbark House after water and weather took out some supports.
- ❖ Ceremony conducted several times by Don Jones, Anishinaabe teacher.
- ❖ Goal met and exceeded for donations from Individuals (like you!) Miigwech.
- ❖ Bid studied and accepted for a brand new water treatment system in 2020.
- ❖ EOBER.ORG web site launched offering new research information and images.
- ❖ A beautiful musical and storytelling event held in August at the Backus Center.
- ❖ Ober's life subject of an exhibit at the MN Historical Society in the fall.

A Word from Board President, Peggy Anne Smith,



(Miskwaanakwadook—Red Cloud Woman)

Back in 2014, we shared news of a local crisis—the Rainy Lake flood. The damage to Mallard Island infrastructure was extensive, but so many people rallied to do the hard work that was needed to restore damaged buildings and their contents. Today I sit in "self isolation" after returning from a trip to Australia in the midst of a global crisis—the COVID-19 pandemic. Right now we are all in shock both from the impact of the pandemic, but also wondering how the public policies being undertaken by our governments will affect us all in the long term. We need to demonstrate the same kind of resilience that brought us together over the local 2014 crisis and hopefully, as Beth Waterhouse has said, embrace the value that *We*

are All One (gi-be-zhi-goo-min) and rebuild a better, more harmonious world .

But, while our world is shaken, we also continue with the work of upholding the mission of the Ernest C. Oberholtzer Foundation. We welcome our new Board members who joined us this year. Each brings a unique set of skills and a commitment to our mission. Welcome Shannon King, Nance Kunkel and Ward Merrill. **Shannon King** is Anishinaabe now living in her adopted community of Nigigoonsiminikaaning First Nation. She is a curriculum coordinator for Seven Generations Education Institute in Fort Frances. Shannon brings her knowledge of Anishinaabe history, knowledge and culture and strengthens our ties to local Indigenous communities.

~ Peggy Anne Smith (continued on page six)

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**Statement of Operating Revenue and Expenses – Unaudited
Ernest C. Oberholtzer Foundation - for Calendar Year 2019**

REVENUE (rounded to nearest dollar)	<u>% of total</u>
Earnings on Endowments, interest from donor designations	23,675 19%
Grants from Foundations	27,270 21%
Dividends and Interest from Investments	20,000 16%
Revenue from Oil & Gas Royalties (and leases)	13,000 10%
Donations from Individuals this year	24,907 19%
Program Fees for Island Use during 2019	17,430 14%
Sales of photos and books (and misc)	<u>844</u> <1%
Total for Year.....	\$ 127,126

EXPENSES (rounded to nearest dollar)	
Staff Salary / Wages and benefits (Director plus 3 contract staff)	57,169
Island Utilities / Organizational Storage	3,100
Administration and Fundraising (Insurance, taxes here)	13,328
Board Meeting Expenses and Travel	10,855
Outreach and Education (incl Anishinaabe ceremonies)	5,212
Archives and Collections Management (w/ archivist wages)	7,823
Direct Summer Program Expenses (w/ special grant exp)	12,062
Capital Improvements & Repairs (w/ new dock)	6,971
Forestry Tasks (all volunteer labor and donated exp)	0
Equipment Replacement (new computer this year)	3,209
Book and Archival Projects supporting the Legacy	756
Contingency/ Gifts	<u>1,336</u>
Total Expenses.....	\$ 121,821
Transfer to emergency fund*.....	<u>5,000</u>
Total for Year.....	\$ 126,821
Excess, This Year	305

We continue to benefit from the endowment campaign by incorporating earnings at 5% from just the designated donations received for endowment. This figure will vary each year. / Foundation salaries supported the director at 65% time plus 2 summer staff people working 4 weeks each, and a website designer part time all year. Our archivist worked part time until September. *Note: Each year, the board designates \$5,000 to a self-insurance/emergency fund. The total by year-end 2019 in that fund, co-mingled in our investments, was \$70,000. ~ Revenue closely matched with expenses this year. Program fees reflected a capacity summer and an increase. ~ We were able to reinvest some of the dividends into long-term savings.

Portfolio of Investments—held with Raymond James & Assoc., Chicago, Illinois

With the guidance of Ms. Rosa Ebling at Raymond James & Associates, Chicago, the Foundation manages a diverse portfolio of investments. Total investments as of 12-31-19 were valued at \$1,155,303. We benefit from \$417,263 in donor-designated endowment gifts as of year end. Special thanks is extended to Antoinette Hickey of Chapman & Cutler LLP, Chicago, for her assistance with financial review and tax compliance over many years. We could not accomplish all that we do without our financially knowledgeable friends in Chicago.

Recognition of Volunteers in 2019

Work Week Volunteers

Michael Reid
Doug Kelley
Craig Fernholz
Jane Lund
Richard Paper
Elizabeth Barnard
Sherry Rovig
Barb Balcom
Tom Balcom
Shannon King
Carol Indereiden
Dave Rolloff
Gordy Paquette
Peggy Anne Smith
Mary Alice Smith
Allie and Ray Zifko

Archives Week Volunteers

Elizabeth Hutchins
Andrea Alison
David Duggan
Kristen Eide Tollefson
Ted Tollefson
Sue Carver
Inga Haugen
Judith Niemi
Karen Obermeyer-Kolb
Jennifer Huebscher

Mallard Island Caretakers during 2019

Mairi Doerr (*)
Prudence Johnson (*)
Jennie Ross
Nance Kunkel
Jane Lund
Paula DeMars
Elaine Thruene

Barb Draper
Judy Blais
Kelly Sassi
Mark Granlund
Mary Swalla Holmes

(*) summer program directors

Steadfast Island Opening and Closing Volunteers

Pam and Darrell Rundell
David & Nancy Markwardt
*New dock by David, Darrell.

Incoming Caretakers Trained this Summer

Katie Rauk
Clay Gustafson

Thanks to 2019 Buoy & Forestry Volunteers

Elaine and Steve Thruene
Bill Thruene
Marlene Ehresman

Special Thanks to our Newsletter Layout Editor,

Nance Kunkel

Zhaa-bo-da-waan Our Teaching Lodge

“The name ‘teaching lodge’ explains its use: people come to this space to learn the universal truths of life— to learn about life.” (Pebaamibines)

We learned more truths from the lodge this summer and decorated its ceremonies with

the correct colors and animal spirits for the four directions.

2019: Stewards of the Wilderness, a First Year of Enthusiasm

Daniel Laurence Andersen played a major role in the design of this effort and in the recruitment of college-age youth to be involved in the experiential learning of this week in three main directions: (*) About the life and work of Ernest Oberholtzer, (*) About his Anishinaabe friendships, neighbors, traditions and language, and (*) About the sustainable uses and compost or water systems now in place on Mallard. Our thanks for funding from the Shakopee Mde-wankaton Sioux Comm’ty.

Seven youth from Macalester, Bemidji State and Northland College attended the week in mid-August. They hosted a group of leaders and elders from the Mitaanjigaming Reserve on Rainy Lake. They learned from Bob Hilke, life-long friend of Oberholtzer as well as Don Jones, Anishinaabe teacher who brought them an experience in ceremony. Also thanks to John Robertson for his special volunteering and climate conversations during this week on Mallard Island.

Efforts are underway to repeat the experience with a new class of Stewards II in the summer of 2020.

Oberholtzer Foundation Board of Trustees & Staff:

- Bill Forsyth Minneapolis, Minnesota
- George Glazier Devens, Massachusetts
- Mary Swalla Holmes Polk City, Iowa
- Pebaamibines (Dennis) Jones Minneapolis, MN and Ontario
- Shannon King Fort Frances, Ontario
- Nance Kunkel Hines, Minnesota and Arizona
- Ward Merrill International Falls, Minnesota
- Bob Norbie Great Falls, Montana
- Michael Reid St. Paul, Minnesota
- Dave Rolloff Sacramento, California
- Margaret (Peggy) Anne Smith Thunder Bay, Ontario
- Diane Crawford Tessari Excelsior, Minnesota
- **Staff:** Mairi C. Doerr and Prudence Johnson (summer program directors) Fiona Reid (webmaster) and Paula DeMars, contract archivist, MN Legacy Grant.

Board President's Letter, continued

Nance Kunkel retired in 2016 after 22 years as the librarian for Blackduck, MN. She was first introduced to Mallard through her mother in 1993 and has been coming to Mallard almost annually ever since. Nance is intimately familiar with all aspects of Island life and work. She describes what she can contribute to the Board: "A long history, a lot of love, and physical experience with the island. A concern for our environment. A desire to see this foundation and this Mallard survive and thrive into the next generation. A recognition of the part we all play in achieving this desire. A desire to give back to this island which has given me so much."

Introduced to the Board by former long-time Board member Bob Hilke, **Ward Merrill** brings a strong local International Falls perspective to the Board through his work with the Backus Center, which he sees as an irony given the historical rivalry between Ober and Backus. But that community connection is so important to the Foundation. As he says: "I would hope to bring my background in "community" work as a Community Education Director in Blackduck and as Executive Director of the Backus Community Center to the Foundation." Ward's roots in International Falls go back to the 1920s when both his maternal and paternal grandparents moved to the area.

After over two years of service as President of the Foundation Board, it is time for some new energy in 2021. I have been honoured to serve, and I look forward to continuing to contribute as a Board member.

~ Peggy Anne Smith

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All 2019 Individual Donations are from:

Richard Adams
Arnold Alanen
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Foundation Gifts:

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Memorial Fund
Head Family Foundation
Knudson Family Fund
Lenfestey Family Foundation
Longview Foundation
Shakopee Mdwakanton Sioux
Community Fund
Harry and Virginia Sweatt
Family Fund, TMF
Winter Wheat Foundation
2018-19 MN Legacy Grant
An Anonymous Family Fndtn.

Gifts Were Made in Memory (Honor) of

- * For Emily Deaver's birthday
- * Sarah Friebe
- * John R. Gregg, Jr.
- * Tim Heinle
- * Bob Hilke, in honor of
- * Martin Kellogg
- * Don D. Maronde
- * Gladys Meade
- * Honoring Jean Sanford Replinger



In mid-June, Allie and Ray Zifko spent their honeymoon on Mallard Island while they also helped with garden upkeep. Allie's (Monahan) heritage started this tradition and she and Ray are maintaining their own connection to Ober's legacy. Photo taken on the porch of Front House.

Annual Report, 2019