**Ernest C. Oberholtzer Foundation**

**Strategic Plan for 2020-2024**

Gi-be-zhi-goo-min (We are All One)



 photo by Dick Isenhart, August 2017

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# BACKGROUND

The Ernest C. Oberholtzer Foundation fosters the legacy of a man known as canoeist and explorer, as leader in policy design for wilderness preservation, and as a friend, student, and storyteller of the local Anishinaabe[[1]](#footnote-1) people. The Foundation is a 501-c-3 private operating foundation that has existed since 1964 and has been active since the late 1970s. The Foundation maintains four islands and shares Oberholtzer’s archives and his historic island home—Mallard Island on Rainy Lake in northern Minnesota.

The Foundation currently supports a part-time executive director and two summer program directors each working for four island program weeks. The organization also supports (and is supported by) an active and committed group of volunteers (often numbering 60-80 each year) who work on the islands to maintain the land, buildings, library, and archives. Our volunteers and occasional contract people are crucial to the management of the organization, augmenting the leadership and hard work of a volunteer Board of Trustees.

The Foundation and its holdings in the Rainy Lake Review islands—Mallard/Ininishib, Hawk/Gekek, Crow/Aandeg, and Gull/Gayaashik—serve those who wish to keep the legacy of Ernest Oberholtzer alive. Oberholtzer was a landscape architect, a scholar, an explorer, and a collector—of books, prints, music, and maps. He was a photographer, especially known for his images of moose. He also documented local Indigenous people living on the land. Especially striking are his photos of traditional wild rice harvesting and processing in areas north of Rainy Lake. His library and collections are, to a great extent, preserved at Mallard Island as a living museum, with many of the archives also housed at the Minnesota Historical Society in St. Paul, Minnesota. Thus this organization attracts historians, preservationists, architects, artists, musicians, and students of Minnesota history and/or Indigenous traditions. Indigenous ceremony is occasionally offered to visitors and is well-received. Most program participants hail from the state and mid-west region, though each summer a few guests fly in from across the country. With the islands located very close to the international border, Ober had, and the Foundation continues to have, close ties with our Canadian neighbors—some also now Trustees.

Our success is measured not so much in numbers as in quality experiences. We hold firmly to the ecological carrying capacity of Mallard Island (12) in order to protect the Island. Our summer is defined by spring ice-out and autumn weather, and we are often, within our natural and policy limits, at capacity for summer shared use of Mallard Island.

The Foundation and its supporters are resilient. The years 2014 and 2015 are good examples of this resilience. In June 2014, Rainy Lake flooded to the second highest lake level on record. In 2015, the Island was back in business thanks to a thousand-plus hours of volunteer help, generous special donations, and a lot of love (more on pp. 11-12).

Though the organization always held planning sessions, the Ernest C. Oberholtzer Foundation operated until 2016 without any formally written strategic plan. Policies have been developed as needed. However, the Board Trustees decided in 2015 that it was time to commit to a new level of strategic planning in order to articulate a common vision, set priorities, guide our allocation of resources, and help decide about measures to both preserve archives and protect the islands.

Above all, our strategic plan is about honoring the power of the place and keeping the integrity of the islands bequeathed by Ober in the spirit that he articulated. Planning helps to answer the question: “What would Ober do if he was alive today?” We act according to the spirit of his written instructions, wilderness conservation interests, and vision for mutually beneficial relationships with Indigenous people in the Rainy Lake watershed and beyond.

This is an important time in the Foundation’s history and on these fragile islands. This strategic plan is meant as a bridge between all existing trustees and any new trustees. This plan is one of our tools to keep Ober’s legacy relevant. Any plan, of course, is a snapshot in time and reflects the best thinking of the current leaders. We describe our Mission, our Vision and Inspiration, and our Values. We explain our financial situation and explore our strengths and challenges.

# MISSION

***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-be-zhi-goo-min (We are all One)***

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In 2015, trustees reviewed the Foundation’s mission, starting with a discussion of Ober’s notes on the “Declaration of Trust” that formed the Foundation in 1964 (document available upon request). Ober wrote an addendum to legal documents to clarify how he wanted his legacy to continue. The Trustees noted concepts like the “universities of the wilderness” and especially Ober’s connection to the Anishinaabe people of the region who Ober wanted to learn from, help, study, and honor. Ober’s words emphasized the key role Indigenous people still play in the economic and cultural vibrancy of their communities—improving land management and conservation. Indigenous cultures everywhere, including on Rainy Lake, enrich and enhance the quality of life and mutual advantages of all people. This review of Ober’s thoughts led to a more inclusive interpretation of the Foundation’s mission statement.

Many early years of operating the Ernest C. Oberholtzer Foundation passed before a mission statement was written down. In one revision, the mission statement was made more general and reference to “Native Peoples” was removed—a version that then stayed in place for a dozen years. However, the trustees felt this version did not meet Ober’s intentions of learning from or collaborating with Indigenous people. Also, Ober’s concept of “universities of the wilderness” does not mean one “place,” but expresses the idea of Indigenous connection to their lands everywhere and how we might learn more about that to change and affect the dominant culture. Thus theabove mission statement was adopted in the autumn of 2015 and carries on today.

# VISION AND INSPIRATION

Students and other visitors on Mallard Island often ask each other, “What are we saving?” We are saving an ecologically-based world view, a simple way of life, and collections and ideas from the mid-Twentieth Century and before, plus several historic structures, gardens, and trails. We are preserving one man’s legacy because of the person Ober was and how his imagination played out in his policies as well as in his home-place.

Mallard Island serves any who visit with an attitude of reverence and respect, but it generously offers historians, architects, artists, and young environmentalists, plus so many others, its stark beauty, its windsong, its birdsongs, and its vistas. It also offers summer storms and a chance to feel Nature’s power.

We are a volunteer-driven organization. We value the volunteer experience and encourage volunteers to join Island or archival upkeep. Volunteer time, energy, and skills are crucial to the management of the four islands and Oberholtzer’s legacy. We seek to maintain and expand our volunteer approach to all areas of our work.

We continue to work toward sustainability as we incorporate the practical changes for those who live on this acre-and-a-half during their week-long stays. Yet, we renovate backwards to the 1930s, preserving the inherent value of the wooden door, the Swedish window, each railing, porch, hatch door, or floor.

Perhaps our deepest offering is another sort of window—a window into Indigenous Anishinaabe traditions and knowledge—a culture that has maintained communities on this lake for centuries. We strive to work together and to learn from each other in the spirit of gi-be-zhi-goo-min, meaning We are One.

When the world looks back on Mallard Island, it will see most clearly the love and careful attention given to this rocky isle by a unique and creative group of people who each brought their own stories and who each held different but interdependent visions for this memorable island place.

# VALUES

The following list represents value statements we have adopted, grouped according to our purpose under Island landscapes and structures, Mallard Island programs and experiences, and the Anishinaabe culture.

## OBER’S ISLAND LANDSCAPES, STRUCTURES, AND LEGACY (Bird House w/ restored balcony)

1. Ober appreciated natural beauty, the art of gracious living, and the visual aesthetic of nature and man together. Part of Ober’s appreciation came from his Anishinaabe friends, their approach that man was integral to a living wilderness. As Ober studied at Harvard University with Fredric Law Olmsted Jr., it’s not surprising he combined the best of both cultures into his island home.
2. The Foundation believes the work done over the last fifty years is part of preserving this aesthetic as a cornerstone of what’s called “the power of the place” in this Strategic Plan. This aesthetic power is the center of gravity of Ober’s vision for the world: a beautiful, sustainable, but yet pragmatic message for all people regarding responsibly using and safeguarding the beauty, richness, and grace of life on this planet Earth.
3. We want to preserve, as much as possible, the elements of design that Oberholtzer created for the buildings, rock walls, vegetation, and landscapes. We have listed Ober’s Mallard Island in the *National Register of Historic Places*.
4. We protect the four Review Islands in Rainy Lake from development with our commitment to a conservation easement with the *Minnesota Land Trust* for Gull/Gayaashk, Hawk/Gekek, Mallard/Ininishib, and Crow/Aandeg.
5. In our commitment to living lightly, we practice the re-use of wood and all natural materials and the composting of food and human waste on Mallard Island.
6. We honor the ecological and biological carrying capacity on Mallard Island by limiting residency to twelve people staying overnight on the Island at any given time.
7. We work to magnify Ober’s legacy by sharing his writing, photographs, oral traditions, and relationships, keeping them alive to inform and inspire the public to believe in the value of wilderness areas and the Indigenous peoples who shaped these areas before European settlement.

## MALLARD ISLAND PROGRAMS AND EXPERIENCE

1. As a non-profit organization, we are called to systematically and publicly share the Island, not to hold its lessons or treasures for a select few, and we are responsible to do so within the Island’s carrying capacity.
2. Mallard Island fosters an attitude of hospitality, acceptance and honoring of individual differences, and caring for all. From academic to laborer, people from all walks of life help make meals and share in the common and equalizing responsibilities of living on the Island together.
3. The Island experience and its books and archives foster discovery and encourage curiosity.
4. We hope that an Island program and the Island’s sense of “containment” offer guests an opportunity to deeply focus; therefore, we encourage visitors to the Island to stay for an uninterrupted week-long experience.
5. Nature is a great teacher on Mallard Island. We encourage reflection, quiet over noise, face-to-face over electronic communications, and we discourage and remove branding or marketing that promotes commercial sales.
6. Ober’s legacy includes his belief that *experiencing* life in the north woods is the best way to learn about it. Thus we foster experiential learning as part of Ober’s legacy.
7. We value access and preservation on site when it comes to the Oberholtzer library and other Island-held archival holdings. Books are to be read and enjoyed, maps to be unrolled and examined, and the archives as held are to remain on Mallard Island.
8. We want this legacy, these Island places, and these values to carry on into future generations; thus we recruit and encourage young adult[[2]](#footnote-2) Island participants.
9. We value the volunteer experience, and encourage (depend upon) volunteers for the management and care of four islands.

## ANISHINAABE

1. We seek to honor the relationships that Ernest Oberholtzer formed with the Anishinaabe people in the Rainy Lake watershed, and we respect the importance of these friendships as they motivated his work and supported his life on Mallard Island.
2. Honoring Anishinaabe relationships includes the practice of designing and maintaining a cross-cultural Board of Trustees with Anishinaabe representation.
3. We seek to continue cross-cultural understanding and to encourage the islands to be places for Indigenous culture (wisdom, arts, music, etc.) to be taught and experienced.
4. We seek to foster the leadership of Indigenous peoples and the speaking and development of the Anishinaabe language—Anishinaabemowin—in programming.
5. With the guidance of Anishinaabe teachers and elders and following Anishinaabe protocol, we incorporate Anishinaabe ceremony in the spiritual work of the Island, out of respect, as a way of learning, as preservation of these practices, and for the Island as protection, in times of change or repair or construction, as well as for the education and awareness of our program participants.

# FINANCIAL PROFILE

The Oberholtzer Foundation kept a low financial profile in its early decades as an organization. Programs, growing in number, were developed and implemented by volunteers, and little outside fundraising was done. Meanwhile, solid relationships were being developed on the Island and off, and the organizational mailing list grew. Individuals were given a semi-annual newsletter featuring creative writing, Island photos, and educational pieces about the people affiliated with Ober and his legacy. The newsletter continues to plumb the depths of Ober’s friendships and his history on Rainy Lake. Although it is not a fundraising piece, the newsletter keeps alive the connections with our constituency.

By the early 2000s, it became clear to the Board of Trustees that they should develop a simple but more formal income and expense budget and that the organization should live within its means, year by year, as much as possible. In June 2010, in consultation with investment professionals, the Trustees approved the Board’s investment policies and principles, and in March 2012, after a few years of correspondence and filing, we became a “private operating foundation” with the IRS, facilitating our receipt of foundation grants.

For the past several years, the organization has ended its calendar fiscal year with a modest excess of income over expenses, yet sources of revenue have developed and changed. At first, we relied fairly heavily on individual donations and oil royalty revenue (part of Ober’s legacy to us). The budget has expanded for special events (2012 centennial tour of Ober and Billy McGee’s canoe trip to Hudson Bay in 1912) and for special work projects (fireplace renovation in 2012). Oil royalty revenue and FEMA funds helped us through the flood repairs of 2014 and 2015.

Shared-use donations or “program fees” for each stay on Mallard Island have always been set far below full cost and yet have been steadily increased to help support the summer program costs. Our base of small foundation grant funding has slowly increased (though it may remain modest). We strive toward a balanced diversity of income sources.

Staffing and operating expenses, meanwhile, have recently held steady at between $100,000 to $130,000 per year to run the summer programs, care for the archives and assets, and support volunteers plus reimburse trustees for travel costs as they govern the organization. Expense budgets ranged from $76,000 in 2011 to $157,700 in 2012 due to the special projects of the centennial year and the fireplace renovation that fall.

By 2013, it became clear to several Board Trustees that we should “formalize” our endowment and add to it. That early Trustee designation was expanded by special bequests and gifts. Meanwhile, the Finance Committee designed and implemented an endowment campaign from 2015 to 2018. They set a goal of $500,000 and secured 92% of that amount in pledges. Pledge receipts flowed in steadily and crested at 90%. Earnings from endowments now form the principal behind two budget lines, with one (the Frances E. Andrews Building Endowment Fund) specifically used for building maintenance expenses. It is our intent to protect the principal in the endowment, using only those revenues that derive from interest on the principal. The earnings percentage (allowable % of interest able to be put into a budget line from donor-restricted endowment gifts) is reviewed and set each year by the Finance Committee and the trustees through their approval of the annual budget.

In the future, the Board will continue to identify and secure the means to expand and support our values and our work in Island maintenance, programs and education through our generous donors, our investments, and funding sources specific to Island maintenance and programing.

# STRENGTHS AND CHALLENGES

## STRENGTHS

Across the years, the Oberholtzer Foundation Board of Trustees has named and addressed strengths, weaknesses, risks, and opportunities.

In the area of strengths, we have built structures and processes that help us succeed as an organization. From the size, strength, and loyalty of the Board of Trustees to the very strong percentage of donors in our database (40% of our mailing list have been givers), we show the ability to govern and raise funds. (The Trustees hold as a goal 100% of their own participation as donors to the Foundation, at whatever level possible.)

The Board of Trustees has evolved and developed, embracing a style that recognizes and respects the power of a diversity of opinions that come together in consensus. In addition, we have welcomed new leadership and have learned ways to identify, recruit, train, and retain new members.

We have a significant and unique history of programs on Mallard Island across thirty-five years, embracing a rare nature-culture combination of experiences. Weeks on Mallard Island help people connect deeply and at the heart level. Participants also respond to the smallness, simplicity, and lack of technology driving the Island time. The inclusion of Anishinaabe culture and traditions, in ceremony and sacred structures, has added a new strength and uniqueness to our Island programs. Ober left us authentic connections to the Anishinaabe people and the culture of a desire to learn from their wisdom about and connection with the land.

Other strengths exist in the multi-faceted archives which Ober left us, some now at the Minnesota Historical Society and some remaining on Mallard Island. The natural beauty of the islands must not be understated, but the archives—books and islands, photography, artifacts, and old music or maps—add an unusual element to our place.

We also count as strengths a staffing process that has generally succeeded across our years of history. Our first paid half-time director was hired in 2005 after three decades of volunteer leadership. Staffing levels remain modest, which does a lot to encourage volunteerism, and the current balance with two weekly-paid summer program directors seems to be working well to cover the needs for Island care and management during each busy summer season.

Our historic relationship with investment professionals in Chicago and the continual modern-day support of the International Falls and Ranier communities for services and supplies all add to our strength. We acknowledge in particular Bald Rock Dock, Camps Koochiching and Ogichi Daa Kwe, Super One Grocery, Rainy Lake One-Stop, and Northern Lumber Yard, as well as several key construction companies, mechanics, and leaders in the local community.

## CHALLENGES

Our leadership believes we need more representation from Canada as well as young adult leaders. In addition, we must monitor balance in all areas of trustee membership.

We recognize the age of our Island buildings (65-95 years) and our vulnerability to fire and theft as well as periodic damaging winds or flooding. We are savvy to the pressures of climate change, yet we could do more to model new behaviors in this regard.

There are demands on our archives and Island time, especially as we become better known. We have addressed this with a strict commitment to carrying capacity guidelines developed in 1985 and with values that hold to simplicity, smallness, and low-impact ways of using the Island. These values have also, we recognize, created a culture of tight time-use and strict schedules across the short summer season. The challenge is to be flexible enough to welcome newcomers from all locations and cultures, yet strict enough to protect the inspiring Island experience.

We try to do the sometimes impossible as we share a cultural and historic resource with the general public for residential stays. We know that there is inherent conflict between preservation and access for careful use.

In 2017, the Foundation was challenged in several significant ways to step back and declare 2018 a “year of reflection and renewal.” What followed was a complete redesign of the 2018 summer and more direct Trustee involvement as we surveyed constituents, held directed discussions with caretakers and other stakeholders, and re-examined our policies and procedures in dedicated time on the island.

### STORIES OF RESILIENCE

June 2014 brought the “perfect storm” of conditions that produced **floods unprecedented** in the past 64 years. Deep snowfall, late ice-out, immediate hot weather, and significant June rains saw Rainy Lake waters rising with astonishing speed. On June 16, staff and volunteers had to turn off the power and abandon Mallard Island, but not before emptying one building and putting the immovable as high up as possible. Volunteers tracked damages and water levels for a month and, in the end, all but one of the summer program weeks were cancelled. Water covered the floors of five buildings. The Executive Director then coordinated five volunteer work weeks rolling from the first days of August until mid-September. A thousand hours were put, with love, into Mallard and its buildings, and significant dollars were raised and spent. By the cold of autumn, we were convinced that the Island and buildings could be saved. The Wannigan kitchen boat benefited from five weeks of careful renovation, though that work also uncovered the need for replacement of its supporting beams.

The year 2015 dawned with new eagerness, and the kitchen boat was raised 14.5 inches by an amazing crew, while volunteers spent three days refinishing the floors of Cedarbark House. Stonemasons came up from Iowa (no flood competition there) and spent three weeks repairing rock walls, supported by FEMA. A third work week of volunteers got us fairly well caught up on general repairs, and the kitchen boat had never looked better. Summer programs unfolded, week by week, with blessed continuity and decent weather, as we regained our trust in Rainy Lake.

Here, an organization showed its true colors. Not only did we draw upon skilled volunteers, but upon the good will of the local community. We cancelled, but we re-created. We made the decisions that we had to make and went forward against the odds. And, true to Mallard Island history and style, folks had a great deal of fun in the process. We have mitigated, in one building, potential damage from future floods, and yet we also learned that we can survive such an event—one in which our strengths became crystal clear.

The **Trees** have also spoken. In both 2016 and 2018, Mallard Island lost trees to straight-line winds (8-10 per episode) and although the wood itself was cleaned up by ready and willing volunteers, Island energies shifted in various locations and the trees are missed. New forest light opens up and teaches us about renewal. We must also understand storms as a potential new “pattern” and carefully incorporate both tree care and care for human safety in our efforts to share the Island. Caretakers clarified their emergency procedures, and the majority were freshly trained.

# CONCLUSION

The Ernest C. Oberholtzer Foundation grew in strength after Ober’s death in 1977, enabling the Foundation to steward the four islands, repair several buildings, design and implement summer programs, begin to manage the library and archives, learn from Anishinaabe traditions, and maintain friendships and relationships in the local Rainy Lake community. This is a tall order for a small organization running seasonal programs, but we have accomplished much, and we have learned and evolved. Our leadership remains healthy and committed to Ober’s multifaceted legacy. We also know that this legacy changes over time, as the lake or the trees change, as we embrace cross-cultural understanding, or as lifestyles adapt. Mallard Island has, through it all, remained amazingly constant and resilient. She has inspired creativity and love of place; there are an extraordinary number of individuals who feel about Ober’s islands as they feel about their own homelands. Mallard Island volunteers and participants leave renewed, with the impact of their Island stay reflected in their careers and in their personal lives. We also hope the Island encourages much-needed but sometimes endangered values, even for those who cannot visit it.

This Strategic Plan is another step in the growth and development of the Oberholtzer Foundation. It is imperfect in this writing, but we know it as a good beginning. We welcome readers of this document to stay connected to the organization, to lend your hands and skills as a volunteer, to visit the islands, or to support us financially as you are able. Through this Strategic Plan, or any other planning that follows, we aim to foster the strengths of Ernest Oberholtzer’s original values and intent and evolve with the knowledge and lessons that have come to us since Ober’s years on Rainy Lake.

***Special thanks to Board Trustee, Margaret Anne (Peggy) Smith, for her facilitation of our initial strategic planning process and for her extra inspiration and editing in the creation of the first Strategic Plan 2016-2019. This Strategic Plan 2020-2024 benefited from her input, as well as Beth Waterhouse and George Glazier, with final approval by the Board of Trustees in April 2020.***

1. Anishinaabe is the term First Nations call themselves. Anishinaabe are Ojibwe or Chippewa people. [↑](#footnote-ref-1)
2. We define “young adult” as someone between the ages of 18 and 30. [↑](#footnote-ref-2)