



A P U B L I C A T I O N O F T H E N O L S D E V E L O P M E N T O F F I C E

# FRIENDS

Welcome to *Friends*, a newsletter for people committed to helping NOLS provide the world's best education in wilderness skills and leadership. This publication aims to provide useful and interesting information on charitable gift planning and the people who support NOLS.

S U P P O R T I N G E X C E L L E N C E A T N O L S • J A N U A R Y 2 0 0 8

## Evaluating Our Route

### *A Final Look at the 2002-2007 Strategic Plan*

BY STEFANI FARRIS

Six years ago, NOLS staff and trustees were hammering out a new five-year strategic plan for the school. It wasn't long after September 11, 2001, and there were suddenly a lot of unknowns. Would people still want to travel to take a NOLS course? If so, would they still be willing to fly abroad, or would they just want to travel domestically? And what about funding? Would NOLS still be on the radar of its donors?

"Even before we wrapped up the plan," says NOLS Executive Director John Gans, "we knew a lot was changing."

Since one of the leadership principles NOLS teaches is tolerance for uncertainty and adversity, the strategic plan, which Gans likens to a "five-year route for the expedition," is by design a flexible document. "Like any expedition," Gans says "we sometimes change routes in progress. But having a plan in the first place is key."

Despite the challenges, Gans cites a number of successes in this round of strategic planning, including the push toward international expansion. The school added semesters in New Zealand, Brazil, and India, as well as a course on Baffin Island and an academic year-long course—NOLS' first—in Patagonia. NOLS also met some long-existing needs with

the completion of the International Base Camp Initiative. That successful campaign raised funds for the construction of a new administrative headquarters building in Lander, as well as a major renovation of the historic Noble Hotel, NOLS Rocky Mountain's beloved home-away-from-home for students and instructors. Gans also notes that NOLS and its programs are arguably more recognizable than they were five years ago, thanks to a vibrant and successful "word of mouth" campaign.

Areas where Gans says the school will continue devoting energy include

increasing access to private lands for NOLS classrooms, and increasing diversity at every level of the school. While the school did make strides in both areas during this round of planning, he emphasizes that "further progress needs to be made."

Overall, Gans is pleased with the school's success over the last five years. "I think it illustrates that even though there were some changes, the results five years later still led to strong achievements. It's a balance between having a solid plan and staying flexible," he adds. "The NOLS organization and culture respond well to goals. Having those laid out creates something that we can rise to." *continued on page 4*



Fabio Oliveira

“THE NOLS ORGANIZATION AND CULTURE RESPOND WELL TO GOALS. HAVING THOSE LAID OUT CREATES SOMETHING THAT WE CAN RISE TO.”

John Gans, NOLS Executive Director



Frederik Norrsell

*NOLS cites great success in the arena of international expansion, adding semesters in New Zealand (above), Brazil (above left) and India.*



#### NOLS LEADERSHIP QUOTE

**“NOLS is an organization that has a history and passion for achieving amazing goals—both in what we accomplish in the field and also as an organization. The ability to have a vision, to plan, and to execute is hard-wired into our culture of expeditioning. I am excited to be part of the framing of the next NOLS five-year strategic planning process.”**

*John Kanengieter, NOLS Director for Leadership, has been leading field courses since 1985. Formerly the director of NOLS Professional Training, John was also the NOLS Rocky Mountain field staff and safety manager for 11 years. John holds a Masters of Applied Behavioral Science with an emphasis in Executive Coaching and Consulting in Organizations. Recently, he has been facilitating the strategic planning process at NOLS.*

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## SUMMIT TEAM PROFILE

## AJ Grant: Remembering NOLS After 25 Years

BY GARY WILMOT

"I remember carrying a litter up a high mountain pass, walking until I thought I couldn't take another step, and then we walked some more," recalls AJ Grant, NOLS Trustee and Summit Team member.

The year was 1973. AJ was a 17-year-old student on a Wind River Wilderness course. The expedition was hard, with thirty days of arduous travel through snow and sleet—and boots frozen from morning to night. In fact, she says, it was the hardest experience of her young life. "I reflect on that moment when I'm at my limit, in work or life, and I remember that I can do so much more than I ever think I can. It is a lesson I carry with me every day."

Since that early NOLS course, AJ has become a pioneering force in environmental marketing, developing public awareness campaigns on environmental and social issues. She is president of the Big Green Company, a marketing and branding organization dedicated to connecting children to nature and reducing childhood obesity. The engine of the company is the new PBS TV show, *Big Green Rabbit*, which airs daily on Rocky Mountain PBS.

AJ sees her decision to join the NOLS Summit Team as a way to give back in a meaningful way to an organization that has had an amazing impact on her life. "As I grew professionally in the world, I recognized that the leadership qualities I benefit from today are in large part from NOLS. NOLS puts everything in perspective—it reduces the world around you to true basics, life and nature. This was and continues to be the root of my professional career. I want to spend my time and resources making sure that it is there for others."

*AJ Grant is a member of the NOLS Summit Team, a recognition society for donors who include the school in their estate or other long-term plans. If NOLS is in your plan, please let us know. Contact us at (800) 332-4280.*



*NOLS Summit Team member  
AJ Grant*

# Planned Gifts and the NOLS

## *Building Stability for the Future*

BY STEFANI FARRIS

### What Is an Endowment?

In the nonprofit sector today, the sure sign of financial stability of a healthy organization is a strong endowment. Comprised of an array of gifts, surplus and interest, an endowment is a reserve of funds that are permanently invested. The return earned on the investment can be used by the organization for a variety of needs. In this way, a single gift to an endowment continues "giving" long into the future.

Because endowments (including ours) typically contain provisions that prohibit spending the principal, they provide crucial long-term stability for an organization, allowing it to stay focused on its mission regardless of changing annual pressures or economic downturns. That stability is not only essential to ensuring that an organization can carry on with its present work, but it also gives board and staff the ability to look beyond current priorities and needs to imagine how the organization might fulfill its mission years from now.

### The NOLS Endowment— Providing Strong Returns

NOLS completed its first endowment campaign in 2000, successfully raising \$8 million. Many in the NOLS family saw the wisdom and need in establishing such an endowment and contributed generously to the campaign. Today the endowment fund stands at over \$13 million.

It's no secret that many donors see an endowment as proof that an organization already has more than enough funding, and in some cases that may be true. But nonprofits like NOLS—whose endowment total is barely half the cost of one year's operation—are still a long way from having too much in reserve.

However, while there's plenty of room yet to grow, we are proud of the strides we've made, and continue to make, toward shoring up our economic foundation and ensuring that a quality wilderness leadership education will remain available for generations to come.

Just as NOLS works hard to be a good steward of the wilderness classrooms through which our students travel, we also strive to be a good steward of the funds entrusted to us by donors. Thanks to the wisdom and guidance of the NOLS investment committee, combined with the strength of the current market, our endowment investments grew by 17 percent, or \$1,902,000, in 2007. This marks the fifth consecutive year of positive returns.

Of course, it's not just future students who will benefit from the foresight of today's donors to the NOLS endowment. Because of the endowment's solid performance for the last five years, the amount of the release has also been growing steadily during that time, allowing us to be in-



# NOLS Endowment

creasingly flexible in meeting the needs of today's students. Currently 4 percent of the average endowment assets over the last 12 fiscal quarters is released each year to support the NOLS scholarship program and other endeavors that allow the school to fulfill its mission. In 2007 the endowment release totaled nearly \$400,000. Roughly half that amount supported critical program and operating expenses—such as curriculum development and public policy research—while the remainder, close to \$200,000, went solely to endowed and general scholarships.

## Planned Gifts & The NOLS Endowment

As the leader in wilderness education, NOLS has always encouraged its students to think ahead and take the long-range view. But the mantra “plan ahead and prepare,” which students hear again and again from their instructors, is just as apt organizationally as it is out in the field.

That's why the NOLS endowment is the beneficiary of all planned gifts to the school unless a donor otherwise restricts the gift. Whereas donors to the NOLS Annual Fund are often eager to see their gifts put to immediate use, donors who make planned or deferred gifts prefer to take a longer view—both of their gift and of the school's needs. Both kinds of support are crucial, of course, and fulfill a distinct need. However, it

## The Endowment at a Glance

- *Date NOLS Endowment Started: 2000*
- *Current Endowment Assets: \$13+ million*
- *Investment Gain in 2007: 17% or \$1,902,000*
- *Amount Released to Scholarships & Programs in 2007: \$399,000*
- *Amount Released to Scholarships & Programs Since 2002: \$1,700,000*
- *Primary Means of Supporting Endowment: planned gifts and endowment-restricted outright gifts*

is the far-sightedness of these latter donors that truly allows NOLS to look ahead and practice what we preach—plan ahead and prepare!

In a few years, NOLS will be turning fifty. As we begin to think about and plan for the next fifty years of wilderness and leadership education (and the fifty after that), it will be more important than ever to build our endowment and stay focused on the school's long-term stability. Planned and deferred gifts are one vital way we can do that. There are a variety of planned gift options, from outright gifts of property or stock to bequests and life-income gifts; however, regardless of which option a donor chooses, they'll know their gift is providing crucial support to NOLS as we seek to remain the leader in wilderness education for many generations to come.

## ALUMNI IN ACTION

### James Eadie: Leadership at Work from Patagonia to Iraq

BY CINDY CAREY



NOLS alum James Eadie

There are multiple Blackhawk helicopters landing today at the Air Force Theater Hospital at Balad Air Base with trauma patients needing emergent care. It's a scene James Eadie knows well. A graduate of a 2004 NOLS Patagonia Mountaineering course, James is also an emergency physician serving his second tour in Iraq.

“We see over 600 patients monthly,” he says, “and provide cutting-edge emergency care to both U.S. and Iraqi patients.”

James got his start in the military through the Air Force ROTC program at the University of Michigan, where he was a bio-engineering major. But he was also drawn to medicine and, upon earning his undergraduate degree, enrolled at Harvard Medical School. He went on to complete his residency in Emergency Medicine through the Harvard Affiliated Emergency Medicine Residency program based at the Massachusetts General Hospital and Brigham and Women's Hospital.

During his last year of residency, James heard about NOLS and decided to take a Patagonia Mountaineering course. “I not only learned a great deal about mountaineering,” he says, “but I gained a great sense of accomplishment from working with my teammates on those mountains.”

Not surprisingly, James finds the leadership and teamwork skills he practiced in the mountains of Patagonia relevant to his duties as a wartime doctor. “Mountaineering and doctoring are very similar. To reach the summit or save a patient's life, each relies on planning, practice, dedication, long hours, and absolute trust in your teammates.”

James is a committed physician helping to change lives one patient at a time. He's also a dedicated alum, as his recent NOLS Annual Fund gift—made online, from Iraq—reflects. “My NOLS experience remains one of the best experiences of my life,” he says.

*Alumni are some of NOLS' greatest resources. Support the school by organizing events, networking, recruiting students and organizing regional chapters. Please contact the NOLS Alumni Department (alumni@nols.edu) to be a volunteer in action.*

Fredrik Norrsell

## GIFTS AT WORK

# Hip, Hip, Hooray!

## Dedications Honor Campaign Supporters

BY STEFANI FARRIS

The fall Board meeting in Lander is always a great time to reconnect with old friends. This fall, it was also the time to wrap up the International Base Camp Initiative, our recent capital campaign, with a few important dedications.

On October 11, friends crowded into the new Tapley Gallery in the Noble Hotel to recognize Tap Tapley, one of NOLS' earliest instructors and a prominent figure in the school's history. Tap and his wife, Anita, were on hand, along with many family members, including his sister and brother-in-law, Terry and Mark Retzloff, whose generous support helped make the gallery possible. The Tapley Gallery serves as a home for important memorabilia related to the history of NOLS and the Noble Hotel.

That same afternoon, folks gathered down the hall in the recently completed DeSo Student Commons. Named for young Justin DeSorrento, whose untimely death precluded his participation on the Patagonia Semester he'd been eager to attend, the DeSo Commons serve as a space for NOLS Rocky Mountain students to relax and unwind before and after their courses. The student lounge was made possible through a generous gift from the DeSo Foundation. Representing the foundation were Justin's parents, Karen and James DeSorrento, and his sister, a Patagonia Semester graduate herself, Suraya DeSorrento.



Above left: Gene and Susan Tremblay pose outside the new Tremblay Conference room. Top right, from left to right: DeSo scholarship recipient Lara McCluskey in the DeSo Commons with James, Karen and Suraya DeSorrento, NOLS Development Officer Gary Wilmot, and NOLS Executive Director John Gans. Bottom right, from left to right: CeCe Stalter, Mark Retzloff, Terry Retzloff, and Tap and Anita Tapley gather in the Tapley Gallery.

On October 12, the second floor hallway of the NOLS International Headquarters was packed with celebrants for the dedication of the Tremblay Conference Room. Named in honor of generous NOLS Explorers Gene and Susan Tremblay, the conference room, situated adjacent to the NOLS executive director's office, provides critical meeting space for NOLS staff, as well as for board and advisory council members. The Tremblays were on hand to accept the honor.

Many thanks to the Tapleys and Retzloffs, the DeSorrento family, and the Tremblays for helping NOLS finish up the International Base Camp Initiative in style!



## PHILANTHROPIC TIDBIT

## Donor-Advised Funds: How Can you Give?

Since the passage in 2006 of the Pension Protection Act, which for the first time gave a legal definition to donor-advised funds, these popular giving vehicles have been the source of confusion for many donors.

The donor-advised fund (DAF) is a charitable fund set up by an individual or family within a nonprofit "umbrella" of funds, such as a community foundation. Donors receive a charitable tax deduction each time they invest money in the DAF. Donors can then recommend how the DAF is invested and distributed, with the final say residing with the umbrella organization. However, there are several restrictions on the DAF that may impact donor intent regarding how their funds are distributed.

The primary condition of the fund's disbursement is that donors receive no direct tangible benefit from their gift choices. Since they have already received their tax deduction when placing the money in the DAF, there is no further tax benefit when the funds are passed on to another charitable organization. Examples of other inappropriate direct benefits include gifts and special privileges for donors from the charity, scholarships for donor-specified individuals, and fulfilling a commitment or pledge.

To learn more, go to [www.guidestar.org/news](http://www.guidestar.org/news), click on "Articles," scroll down to "The Law and Regulations," and click on "New Rules Affecting Donor-Advised Funds."

## Evaluating Our Route

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Staff and trustees are already hard at work finishing up the "route" for the next five years of the NOLS expedition. After months of gathering input and suggestions, and winnowing that information down to a few common themes, they met in December for a final planning meeting. Since then, they've been working on final revisions and adjustments. Along the way, they've been supported in their efforts by the Boston Consulting Group, which has graciously offered its services to NOLS pro bono. The 2008–2013 plan is set to be approved at next month's Board of Trustees meeting.

## NOLS Staff On the Road!

NOLS Alumni and Development staff regularly travel around the country—and we love to connect with our alumni and donors. If you're interested in visiting with us this spring and learning more about what's happening with NOLS, please call us at (800) 332-4280 or email [development@nols.edu](mailto:development@nols.edu).

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