



Mountain Spirit  
INSTITUTE

Facilitating Reconnection to Self,  
Each Other, The Environment

Case Presentation  
2007



**Board of Directors:**

**Robert Stremba, PhD**  
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Vice President  
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Voices of the Land

**Vanessa Laurella, RN, PhD**  
Park City, Utah

**Staff:**  
**Dexter R Richards**  
Executive Director

**Becky Bowles, Coordinator**  
Art of Living Program

**Joseph Tang, Coordinator**  
US-Peruvian Music Exchange,

**Chris Mulcahy, Coordinator**  
Kearsarge Wilderness Experience

*The mission of Mountain Spirit Institute is to facilitate one's connection to self, each other and the environment. By so doing, participants will have a greater appreciation, and understanding of their own resources, of other individuals around them, as well as a better sense of their place in the natural world. Self reliance, compassion, service, centeredness, physical fitness and interpersonal community-building, as well as caring for, and understanding of the natural environment, are hallmarks of the mission..*

Case Presentation - 2007



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Mountain Spirit Institute is a fully insured & federally recognized 501-(c)-3 educational organization.



## Mission Statement

The mission of Mountain Spirit Institute is to facilitate one's connection to self, each other and the environment. By so doing, participants will have a greater appreciation, and understanding of their own resources, of other individuals around them, as well as a better sense of their place in the natural world. Self reliance, compassion, service, centeredness, physical fitness and interpersonal community-building, as well as caring for, and understanding of the natural environment, are all hallmarks of the mission.

A photograph showing two hikers silhouetted against a bright sky, standing on a rocky mountain peak. One hiker is holding a long pole or stick. The foreground is a rocky, brownish terrain.

## Organizational Purpose

Mountain Spirit Institute's purpose is to provide a forum for teachers, lecturers, authors and artists to teach, facilitate or publish what they have to offer the world. These givers are invited to come into the circle to teach, for a day, or a lifetime, under the financial, legal and administrative umbrella of the organization as long as they meet the criteria, as set by the board and administration, the bylaws, MSI's policies, and their offering falls within the scope of the mission statement.

# Core Values

## Body, Mind and Spirit

### Programs



MSI consistently offers emotionally and physically challenging, safe, high quality programs that vary in their scope and medium. The programs will always come back to the tenants of connection, compassion, centering, and awareness which in turn enables and empowers individuals to be more self reliant, and contribute more to family, society and the planet.



Science is proving what Eastern Mystics have known all along, that we are "all connected" on a fundamentally basic level and our thoughts literally create our reality. Healthy diet, exercise, spiritual centering and training of the mind are interrelated and important aspects of a healthy life.

### Experiential Learning



One learns better from an educational process based on doing and then reflecting on the experience rather than only lectures. Participants are empowered to learn through challenges presented in a logical and incremental way. A value forming experience can happen in a short time when facilitated properly and reflected upon.



### Learning from Indigenous Wisdom

An overlooked aspect and connection in our modern day technological society is the people who have lived before us. We are just now discovering the depth and wisdom of indigenous cultures. We not only acknowledge this wisdom but seek connections with those still practicing traditional ways, and who have not forgotten the ways of their ancestors. We are a young culture and can learn much from "our Elders".

### Social Responsibility



All courses impel participants into working and problem solving experiences together on manageable challenges presented by the facilitator and the nature of the program. By experiencing the results of their actions, participants can transfer new ideas and commitments to others at home, work, the community and the environment.

### Publishing & MSI Website

MSI's Website is an educational resource. MSI will facilitate and aid authors, artists and musicians to create works. This makes the world a better place. MSI will actively support emerging works through the grant writing assistance.



### Environmental Education and Sustainability



Due to global climate changes, & our overdependence on non-renewable energy, MSI is committed to providing education and resources on sustainable living and the environment. A direct experience and personal relationship with the out-of-doors is vital. Individuals will have more of a sense of responsibility to the earth upon which they live.

### Service



All programs give back to local communities through some form of service, whether it's assisting local projects, mowing someone's lawn or picking up trash along the trail. Service projects are an integral part of MSI programs.



### **The Need in Our Communities: The current situation**

- Americans of all ages are facing an increasingly stressful lifestyle
- The use of alcohol and drugs, is a serious problem in American society.
- There is a disconnect with the natural environment due to technological advances.
- Our way of life is taken for granted. Global warming and the peaking of world oil reserves dictate that we rethink and start practicing sustainable and holistic living practices.
- Mainstream media does not cover significant and important resources on which our mission focuses, which MSI can play a part, by providing through our lecture-film series and web resources.
- Mental health statistics reveal that teen, and adult violence, stress, depression and suicide have risen dramatically. Physical health problems are also prevalent.

### **MSI's History of Success**

- Sunapee High School, NH/Outward Bound Scholarship Program
- Art of Living Peruvian Studies Program – Four part program over two years
- Annual Sunapee SunFest Holistic Health and Sustainability Festival
- MSI Film Series – Monthly presentations of documentaries and important films
- MSI Lecture Series – Author Howard Cutler discusses his book of interviews with
- His Holiness the 14<sup>th</sup> Dalai Lama of Tibet
- Kearsarge Wilderness Experience Program – wilderness skills and familiarization
- Peru Cultural Immersion Programs – Experiential learning with Andean mountain cultures
- Outdoor Climbing Programs
- Slide Shows on foreign Cultures

*Some Past Participants*  
*(References)*

*Partial list*

**John Meara & Cameron Frisbee**  
*Lakota 2006 program*

**New Hampshire Emergency Medical Systems: 2001 Conference**  
*Professional Development Program*

**Alice Peck Day Hospital**  
*Professional Development Program*

**Professor Larry Johnson & Family**  
*Peru Cultural Immersion*

**Joel Dulude**  
*Peru Cultural Immersion*

**Reverend Richard Dutton, New London, NH**  
*Kearsarge Wilderness Experience*

**Mrs. Donna Shultz and Family**  
*Peru Cultural Immersion*

**Mr. Carlton Bradford, New London, NH**  
*Kearsarge Wilderness Experience*

**Matthew Green**  
*Alpine Rock Climbing program*

**Omega House for Boys**  
*Alpine Climbing Programs*

**25+ participants**  
*Art of Living Apprenticeship with Theo Paredes, Ph.D*

-----  
**600+ participants**  
*Sunapee SunFest Holistic Health & Sustainability Festival*

# Testimonials

"With four years at the University of Michigan and five years working in the field of mental health, I have been exposed to many educators. Randy is one of the greatest teachers and facilitators I have had the opportunity to meet. I recommend him in the strongest terms. He is top-notch."

Christie Warbasse, Client

"The pacing was right for the group, where there were reasonable challenges and a good esprit d'corps, right timing at teachable moments with clarifying and patient responses. Randy exudes confidence in ability to provide security, teach and have fun."

Rev. Richard Dutton

Kearsarge Wilderness Experience participant

"Our group of eleven people barely knew each other coming into our experience with you. By the end of the day bonds were created that remain strong and intact. My best friends are the ones that you helped me bond with and create a support network with. You possess a unique ability to create an atmosphere of comfort among people who do not know each other well, and you are clearly able to structure activities so that each person walks away feeling a sense of self-confidence and accomplishment."

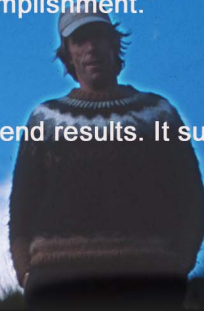
L. Dardick

Yale School of Management

"I had no idea what to expect, but I was thrilled with the end results. It sure met my expectations!"

Richard Kipperman,

Kearsarge Wilderness Experience participant



"Thank you for your week with us. You added so much to the experience and our mission was accomplished. Your leadership and facilitation style was a big hit with us all."

Coleen Myers

Executive Director, Institute for Civic Leadership

"Randy is an excellent instructor, teacher, facilitator, person. Everyone should be so lucky to work with him or be instructed by him. His diversity and array of talents add much to his courses."

Raleigh Coburn,

Instructor and Colleague

"Thank you!!!! for all your efforts at the EMS conference. Because of you, and others, the conference was a major success. We're planning for next year's conference and hope that you will again be a part of it."

EMS Conference Committee





## Notes from the Field

***A 22-year old man, on a three-week mountaineering program*** in the North Cascade Mountains of Washington State climbs the steep rock wall at 9000 feet. He's from New Jersey, and has never camped in his life. Now, just as he's about to "top out" on the summit of this rocky peak, he has skills and perceptions he'd never dreamed of possessing. He pulls up over the last ledge. I'm there at the top watching his face, as he takes in the 360 degree vision of the Cascade Mountains. He's in awe and drops to his knees.

***Donna, with her teenage son, daughter and a friend, are at 16,000 feet in the Peruvian Andes,*** spending two days with village elders and priests of "The Nation of the Q'eros." It is said, when the Spanish Conquistador Pizarro and his men looted Cusco Peru in the 1600's, the Holy Priests of the Inca Empire retired into the mountain communities now called Q'eros. Some believe that these Elders are the descendants of those priests. The Elder challenges the teens about their concept of life and the environment. We spend two days learning about the plants, mountains, the earth and our role in it. They also talk about how to "keep one's center" when life situations bring challenges. The Elder explains to the teens, that more is not better. More importantly, he tells them they have the power to be themselves in what can often be confusing times.

***A group of six nurses, blind-folded, crawl*** on their hands and knees on the lawn outside the hospital. They are looking for little colored plastic building blocks. They are taking non-verbal cues from their six teammates outside a thirty-foot circle marked on the grass. The toot of a whistle means go left, a shaker means "no", a bell, "yes". Frustration builds and tempers flare. Fifteen minutes later, reunited in a big group, the participants share what it was like to not be heard, or not being able to communicate to a team member. I ask them does this ever happen at work?

***Solo participants have just been led back to their wilderness basecamp*** from their three-day Solo Experience deep in the woods. They have returned in silence, sitting in a circle, and are now sharing some of their experiences. One participant breaks the silence and shares a poem:

*The time to meditate comes slim, indeed!  
The constant business of life about me  
leaves short time for quiet thought.  
Sometimes I desire no busy life about me  
-- just the rocks, the snow , the night and the stars;*

*For these things I do not disturb  
when I think deep and alone  
and feel close in my being  
to a silent and knowing God  
coming forth from these things*

*-- the rocks, the snow, the night and the stars.  
William Allan Long.*

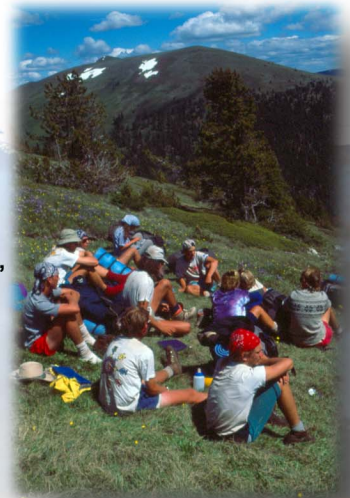
# Programs: Range and Scope



## Outdoor Experiential Learning: Wilderness Skills and Challenge Courses

Elements range from the basics of putting up a tent and safe cooking practices to hiking, navigation and camping. Feeling the freedom of safely moving in the wilderness with solid skills encourages people to get out more, and consequently, have a greater affinity for nature.

Programs are bound to community and teambuilding. Reaching the summit of the mountain as a healthy well functioning group is vital to the “success” of any expedition. Learning experientially about group behavior in the wilderness leaves an impression that is directly transferable to home and workplace.



## Programs of Cultural Immersion:

Hiking, and family stays in small villages in the country: Programs include beginner to intermediate hikes and trekking in mountainous regions. We emphasize the wholistic nature of being in the wilderness and on the high peaks. We focus on teamwork, the mountain spirit and the rejuvenating power of place. Immersion in Indigenous Cultures: Programs: conducted in New Hampshire, the Northwest and in the Southwest and South America. Focus is on contact with traditional with indigenous cultures, family home stays and learning about tribal/elder philosophy.

## Our “Ultimate Concerns”: Health and Wellness, Sustainability :

### Sustainable Living:

Teaching and examining lifestyles that are more in balance with self, family and the earth Exploring authors, leaders and educators that investigate and share their knowledge of living a lifestyle that relies less on non-renewables and more on sustainable source of energy.

### Yoga, Aikido, Tai Chi and Similar Programs:

Programs conducted in a wilderness or natural setting.

### The Power of Presence & Atitudinal Healing:

Programs that cover maintaining a healthy sense of presence & humor perspective during life change and crisis using such texts as The Art of Happiness by Howard Cutler & H.H. The Dalai Lama, and The Power of Now by Eckhart Tolle.

### Music Therapy and International Music Exchanges:

Workshops and concerts: music as “entrainment” rather than entertainment. Learning from South American musicians through exchange programs, and domestic musicians and music therapists .

### Meditation Techniques:

Courses on mindfulness and basic meditation, in a natural setting.



# Programs: Range and Scope

Continued



## Solo Experiences:

Our society has few formal rites of passage. Solo's for people of any age. One course exists just for teens. This 1-3 day long program does not imitate Native American ceremonies, rather, provides a framework for today's youth and adults, & their concerns. Participants contribute to how their experience unfolds. Facilitated group activities and discussions, plus living alone in nature for three days, with the safety net of a facilitator, provides a powerful exploration into one's self and exhudes value forming experiences.



## Indigenous Wisdom and Prophecy:



A serious shortcoming of the "Western construct" is our inability to see and learn from indigenous cultures who have lived for thousands of years in balance with nature. Courses, seminars and author's lectures will be offered on what tribal people know and their warning about living out of balance with nature.

## Web Site:

MSI's Web site will not only provide information about MSI and it's programs, but serve as a public resource of information and links for non-mainstream news coverage, innovators & authors plus, links, to resources which are in line the MSI's mission statement.

## Grant Funding and Scholarships:

An important role of MSI is to provide funding through grants and scholarships for not only our own programs but also Outward Bound Wilderness programs through local High Schools. MSI will also aid in publishing works of art, music and writing. Individuals receiving these grants will teach/facilitate workshops in their field for MSI. Scholarship funds are made available for families and participants demonstating a financial need. An additional target for aid will be specific educational or environmental projects in South America.



## Healthy Communication, Leadership & Teamwork:

Seminars, lectures and workshops on healthy communication styles, models for giving and receiving feedback, listening skills and leadership have been conducted for local organizations, small businesses, government agencies and other groups. The workplace is an important environment where MSI can be of service.



## Current Programs & Services 2007

*For complete details on these programs see: [www.mtnspirit.org](http://www.mtnspirit.org)*

**Art of Living Apprenticeship Series:** A four part workshop series with returning participants who study with Sr. Don Theo Paredes of Cusco Peru. Mr. Paredes the former mayor of Cusco, and a well respected teacher of Inca Philosophy. This popular program started in 2006 and averages 18 participants.

**Kearsarge Wilderness Experience:** One of MSI's first programs, a weekly wilderness skills program for the general population of the Kearsarge/Sunapee area. The third program will be held spring 2007 and covers everything from bow-drill fire making to map/compass reading and safe hiking practices.

**Lakota Native American Immersion Program :** Participants stayed with Elder Albert Whithat on the Rosebud Indian Reservation in Mission, South Dakota for 8 days. Sweat lodges, Sun Dances, visiting at the Sinte Gelska University have been on the curriculum.

**MSI Film & Lecture Series:** Important and timely films and lectures on such topics as the environment, global warming, peak oil, quantum physics, the emerging culture and international relations are shown regularly at a local venue.

**Peru Cultural Immersion:** Two week family stays near Machu Picchu and Cusco.

**Peru Cusco Music Exchange:** Two weeks in Cusco and Machu Picchu, learning from local musicians, instruments, Peruvian music styles and rhythms.

**Peru Shamanic Studies Program:** Dr. Theo Paredes leads a group for study and visits in the Manu Rainforests, Machu Picchu. Shamanic Studies and Inca Philosophy are the focus of this program.

**Solo:** Three day wilderness retreats facilitated by an instructor with readings, tone setting and safety with minimal gear for a meditative few days, in Colorado and New Hampshire.

**Sunapee SunFest:** MSI was approached by two organizers who were seeking sponsors get this festival off the ground. It proved a popular success. Holistic health and Sustainability issues are the focus through music, lectures, holistic healing sessions and vendors. The 2007 Festival will double in size.

**Sunapee High School Outward Bound Scholarship Program:** MSI has facilitated three students from Sunapee HS thus far to participate in Outward Bound Wilderness programs for youth. We are going on our third year. R. Richards has enabled Sunapee HS to be a "partnership school" with OB giving the school's students special opportunities for grants and scholarships for such programs.

**USA Peruvian Music Exchange:** Guillermo Seminario, musical director of the traditional Peruvian folklore band Chimu's of Cusco Peru has a stellar presence and musical ability to touch people's souls with his traditional Andean music. MSI is sponsoring Chimu's as an artist in residence in 2008.

# Mountain Spirit Institute, Our History

1998

- First participants to Peru.
- First "Kearsarge Wilderness Experience" program conducted.

2000

- Registered as a non-profit educational organization.
- First corporate teambuilding seminar conducted.
- Second Peru experiential trip conducted.
- Teambuilding programs conducted.
- Second Kearsarge Wilderness Experience Program
- Board of Directors, advisors, timeline and action plan developed

2001

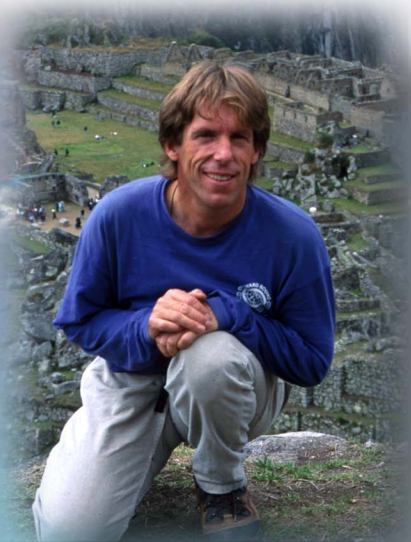
- Case Presentation
- Third Kearsarge Wilderness program conducted.
- Second Teambuilding seminar delivered.

2003

- Founding B.O.D. formed, Articles adopted
- Non-Profit Status approved

2004-6

- 501-(c)-3 Non-Profit & Insurance obtained, Bylaws, Safety Policies & Risk Mgmt. completed.
- Programs: Sunapee SunFest, Lecture Series, Art of Living Film Series, Peru Programs
- Solo and KWE programs, Scholarships for Outward Bound/Sunapee High School



## Staff Background

Qualified, certified program coordinators and instructors: facilitation, mountaineering, climbing, wilderness skills, cultural, spiritual leadership professional development,

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Outdoor Skills Education:

Since 1973

I'I Mountain Guiding:

Since 1981

Experiential Education:

Since 1989

I'L Expedition Guiding:

Since 1997



Dexter R Richards, Founder and Executive Director graduated from University of Utah and has been running programs under MSI for 5 years both domestically and internationally. He has been a Course Director, Staff Trainer and Corporate Team-building Facilitator for Outward Bound since 1989 conducting multi-element, international and professional courses from one day to three months.

His work as a guide and facilitator for Outward Bound, Alpine Ascents International and Mountain Spirit Institute has taken him from Maine and Washington to Mexico and throughout South America. Randy speaks German, French,

Spanish, and conversational Quechua and Italian. He is currently certified as an Action Learning Course Specialist and Wilderness E.M.T. He is a professional member of the American Mountain Guides Association & certified PSIA Level III Alpine and Level II Nordic Downhill Ski Instructor and backcountry guide and holds a USCG 100-ton Captain's License.

## Mountain Spirit Institute - Board of Directors

Bob Stremba, Ph.D., Acting President, Vice President,  
Professor & Coordinator, Adventure Education Department  
Fort Lewis College, Durango, CO

Becky Bowles, LMT, Treasurer,  
Owner, Renewal Therapies, New London, NH

D. R. Richards, Founder, Secretary  
Sunapee, NH

John Herrington, Manchester VT

Vanessa Laurella, RN, Ph.D.  
Park City, Utah





## Governance & Infrastructure

2007

### **Governance:**

MSI's board is directed by the articles of incorporation and by-laws. Meetings are conducted via best practices. Our board stands at four and are currently seeking additional candidates.

#### **Robert Stremba, Ph.D.,** *Acting President, Vice President*

Coordinator, Adventure Education Department, Fort Lewis College, Durango, CO

Bob created the Adventure Ed program at Plymouth State University, and has recently accepted the coordinator position at Fort Lewis College where he will build a similar program. He has extensive background in managing wilderness educational programs, one being with REI Adventures of Seattle. He often incorporates "spiritual reconnection and a sense of place" in his teachings. He also currently teaches a courses for Outward Bound Wilderness during the summer in Colorado and Washington.

#### **Dexter R. Richards,** *Secretary*

*MSI Founder and Executive Director*

Sunapee, NH

Randy is a graduate of University of Utah in Recreation Management. He has been a senior international mountain guide for Alpine Ascents International, staff trainer and instructor for Outward Bound, and guided in the Alps, Aconcogua, Argentina; Huascaran, Peru, Ecuador's Volcanoes and throughout the western Pacific Crest range on programs lasting from three weeks to three months. He is a performer of world and folk music and a music therapist for Alzheimer patients.

#### **Becky Bowles, L.M.T.,** *Treasurer*

Owner, Renewal Therapies, New London, NH

Becky has background in fundraising and development at Colby Sawyer College, and is owner and founder of Renewal Therapies both in New London, NH. She is a licensed massage therapist, and uses hot stone therapy as well as cranial sacral therapy. Becky is currently a student of Don Theo Paredes, of Cusco Peru.

#### **John Herrington,**

Founder, Voices of the Land, Manchester, VT

John has served as the Executive Director of two environmental non-profit organizations. His currently significant time in South America and the American west, although calls Vermont home.

**Vanessa Laurella, R.N., Ph.D.**

Park City, Utah

Vanessa comes to MSI with a wealth of experience in management and organizational development from the private, public and educational sector, and has served a variety of clinical, administrative and educational roles at the University of Utah College of Nursing for more than 20 years. She has a keen interest in spiritual and holistic living practices.

MSI has an extensive business policies and procedures manual which has been reviewed by our insurance company. Our treasurer oversees MSI finances (fundraising, scholarship, program deposits and checking). A bookkeeper reviews the director's entries, and a CPA reviews the annual report submitted to the New Hampshire Division of Charitable Trusts, with whom we are registered.

**Infrastructure:**

MSI has full liability insurance through Worldwide Outfitters and Guides Association in Salt Lake City, Utah. It has developed a website. MSI has little capital equipment. Other equipment and services, such as first aid kits, printers, scanners, internet service etc., has been loaned to MSI for programs by the director.

**Location:**

MSI is based in the home office of Randy Richards, located on Lake Sunapee in the town of Sunapee, NH. The "mobile concept" of running this organization was a decision drawn from the founders of the Omega Institute in Reinbeck NY who suggested we not jump into wanting or building a physical plant early in our development.

Technology allows the director to take the office, (credit card machine and all) on the road to Peru or Utah to meet with directors, or coordinate programs.

**Staff:**

MSI has no regular paid staff, although there are program coordinators, program cooks, and one executive director. Program coordinators are compensated when there is money to pay them (with prior arrangements) on commission basis such as the USA Peruvian Music program, on a contract basis.

MSI staff are:

Becky Bowles, Sutton, NH Art of Living Coordinator

Joe Tang, Dover, NH: USA Music Exchange Coordinator

Chris Mulcahy, Plymouth, NH: Kearsarge Wilderness Experience Co-Coordinator/Instructor

Randy Richards, Sunapee, NH: Executive Director and MSI Program Director

Josiah Eikelboom, Portsmouth, NH: Cook for Art of Living program

Guillermo Seminario, Cusco, Peru: Cusco Music Exchange Coordinator/Instructor

Theo Paredes, Ph.D. – Art of Living Instructor

# STATE OF NEW HAMPSHIRE



## DEPARTMENT OF JUSTICE CHARITABLE TRUSTS DIVISION

### CERTIFICATE OF REGISTRATION

*MOUNTAIN SPIRIT INSTITUTE*

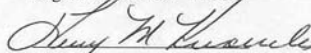
*SUNAPEE, NH*

is registered as a charitable trust with the Department of the Attorney General, Division of Charitable Trusts pursuant to Chapter 7 Section 19 of the Revised Statutes Annotated of the State of New Hampshire.

Date of Issuance: *6/22/2004*

PETER W. HEED  
ATTORNEY GENERAL

Registration number: *15358*

  
Perry M. Knowles  
Registrar of Charitable Trusts

NOTE: THIS CERTIFICATE OF REGISTRATION IS ISSUED TO CHARITABLE TRUSTS IN COMPLIANCE WITH RSA 7:19 RELATIVE TO REGISTRATION REQUIREMENTS. CHARITABLE TRUSTS MUST ALSO COMPLY WITH PERIODIC REPORTING REQUIREMENTS AND OTHER LAWS. CURRENT INFORMATION MAY BE OBTAINED FROM THE REGISTER.



## Financial Summary

2007

### **Summary**

Financials are based on the last fiscal year Oct 1, 2005 – Sept 31, 2006. Mountain Spirit Institute is in a “long start-up phase”. Founder Randy Richards has loaned MSI \$19,000, since the organization was registered as a non-profit organization. Programs have been paying for themselves, but startup, marketing expenses have been born by loans from Randy.

### **How MSI generates revenue**

MSI generates gross income from three sources: 1) Program fees, 2) SunFest special event income (vendor fees, silent auction, T-shirts & program guide), 3) Donations. We have a fair trade products webpage, which will generate additional income.

### **Expenses**

MSI’s main expenses, are facility rentals for programs, SunFest, marketing and program staff leadership compensation.

### **Current Financial Picture**

MSI owes Randy Richards \$19,600 in startup loans to the organization. Our accountant states that this “transaction at arm’s length” should include a moderate interest rate following standard business practices. At the end of last fiscal year, MSI had assets of \$4,600. Our net worth as of February 23, 2007 is -\$16,200.

### **Projected Financial Picture**

Now that the infrastructure is set up (insurance, filings for non-profit status, etc), the goals are to expand programs and develop a fundraising strategy. Additionally, R. Richards will be developing 1) debt retirement funding 2) direct mail solicitation 3) board development tasks and fundraising initiatives 4) Additional fundraising events, possibly an additional second SunFest event in Utah 5) contracting a grant proposal writer.

8:25 PM

02/25/07

Accrual Basis

**Mountain Spirit Institute**  
**Balance Sheet**  
As of September 30, 2006

Sep 30, 06

**ASSETS**

Current Assets

Checking/Savings

LSB Checking-3350 784.10

LSB Savings Fundraising-0040 1,896.06

LSB Savings Program Dep-6300 1,348.32

Total Checking/Savings 4,028.48

Accounts Receivable

Accounts receivable 200.00

Total Accounts Receivable 200.00

Other Current Assets

Undeposited Funds 410.00

Total Other Current Assets 410.00

Total Current Assets 4,638.48

**TOTAL ASSETS 4,638.48**

**LIABILITIES & EQUITY**

Liabilities

Current Liabilities

Other Current Liabilities

Trustee & employee loan payable 19,591.98

Total Other Current Liabilities 19,591.98

Total Current Liabilities 19,591.98

Total Liabilities 19,591.98

Equity

Unrestrict (retained earnings) -10,111.95

Net Income -4,841.55

Total Equity -14,953.50

**TOTAL LIABILITIES & EQUITY 4,638.48**

8:26 PM  
 02/25/07  
 Accrual Basis

**Mountain Spirit Institute**  
**Profit & Loss**  
 October 2005 through September 2006

Oct '05 - Sep 06

Ordinary Income/Expense	
Income	
Contributed support	
Indiv/business contribution	
Restricted-Scholarship	
Raffle	58.00
Total Restricted-Scholarship	58.00
Indiv/business contribution - Other	230.00
Total Indiv/business contribution	288.00
Total Contributed support	288.00
Earned revenues	
Advertising revenues	
T-shirts, stickers, etc	439.00
Advertising revenues - Other	650.00
Total Advertising revenues	1,089.00
Interest-savings/short-term inv	5.14
Non-program sales	89.00
Program service fees	
Referral Discount	-55.00
Program service fees - Other	15,810.00
Total Program service fees	15,755.00
Total Earned revenues	16,938.14
Special events	
Special events - non-gift rev	
Silent Auction	948.03
Special events - non-gift rev - Other	1,900.00
Total Special events - non-gift rev	2,848.03
Total Special events	2,848.03
<b>Total Income</b>	<b>20,074.17</b>
Expense	
Business expenses	
Advertising expenses	
Web/Internet	947.99
Advertising expenses - Other	4,030.60
Total Advertising expenses	4,978.59
Bank Service Charge	229.80
Insurance - non-employee	2,149.35
Membership dues - organization	105.00
Organizational (corp) expenses	100.00
Total Business expenses	7,562.74
Non-personnel expenses	
Computer Supplies	54.00
Postage, shipping, delivery	173.66
Printing & copying	250.00
Supplies	778.93
Telephone & telecommunications	289.99
Total Non-personnel expenses	1,546.58
Other personnel expenses	
Accounting fees	566.25
Total Other personnel expenses	566.25

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Accrual Basis

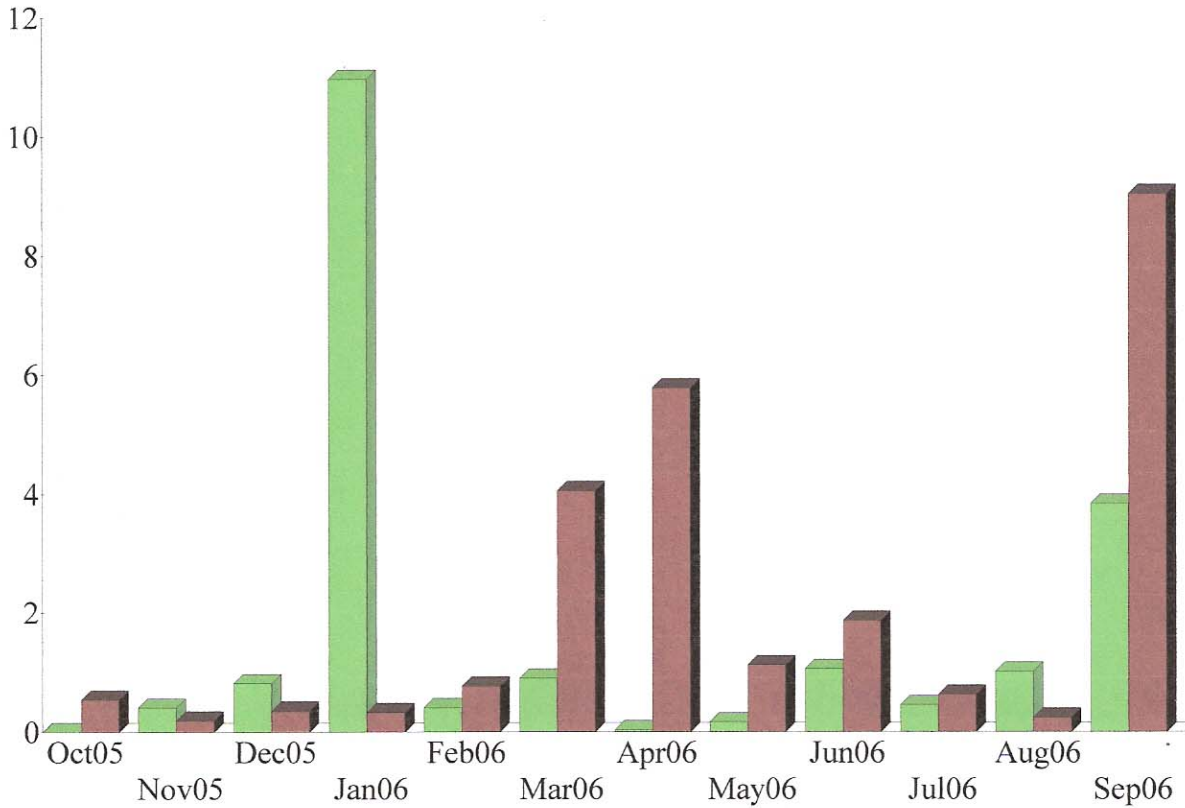
**Mountain Spirit Institute**  
**Profit & Loss**  
October 2005 through September 2006

	Oct '05 - Sep 06
Program Services	
Facility Rental	5,891.00
Program Staff	7,498.00
Program Supplies	1,744.05
Total Program Services	15,133.05
Travel & meetings expenses	
Conference,convention,meeting	71.78
Travel	35.32
Total Travel & meetings expenses	107.10
Total Expense	24,915.72
Net Ordinary Income	-4,841.55
Net Income	<u>-4,841.55</u>

Income and Expense by Month  
October 2005 through September 2006

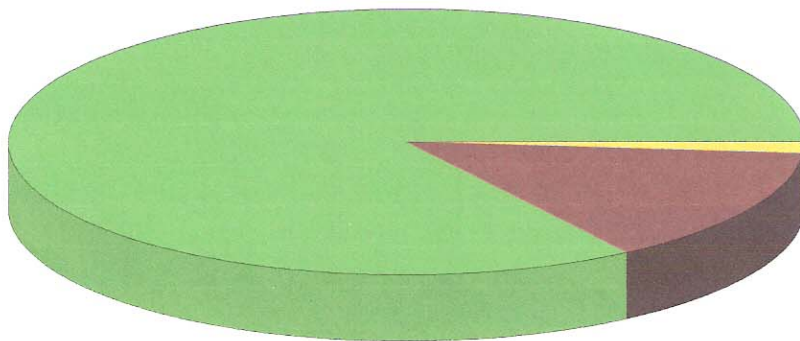
Income  
Expense

\$ in 1,000's



Income Summary  
October 2005 through September 2006

Earned revenues	%84.38
Special events	14.19
Contributed support	1.43
Total	\$20,074.17

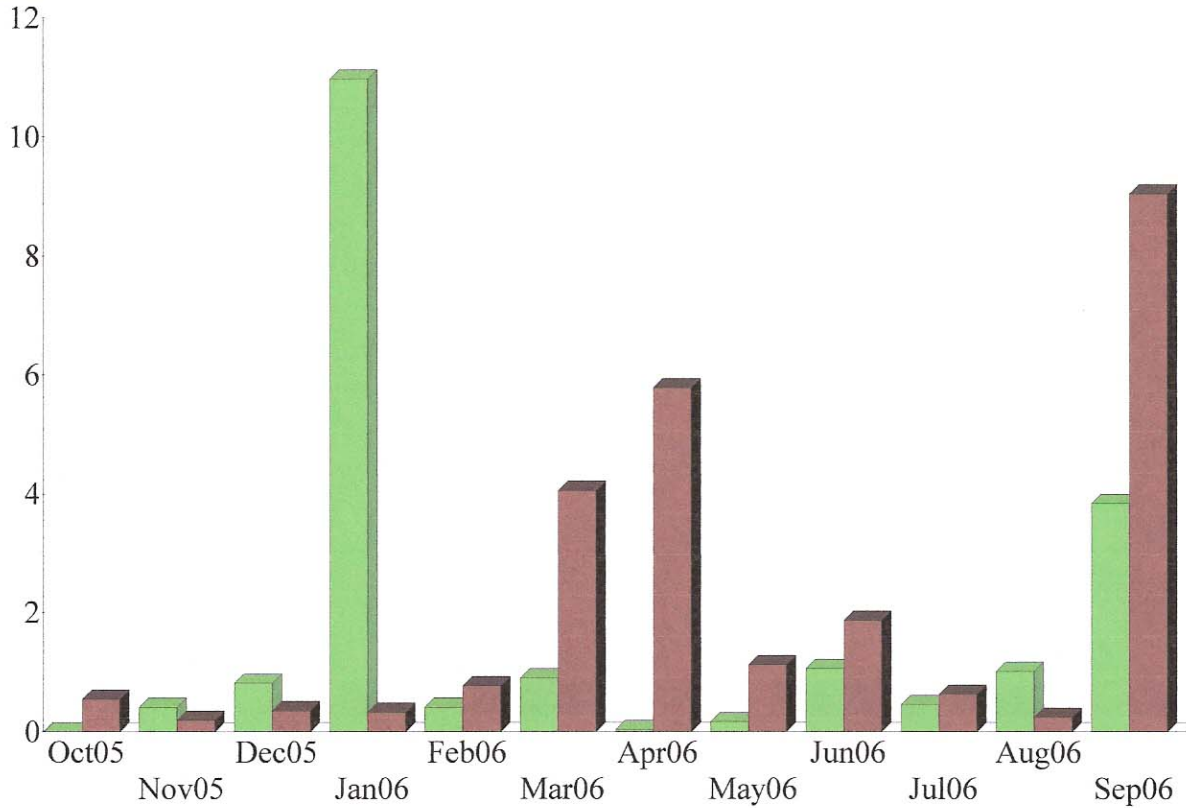


By Account

Income and Expense by Month  
October 2005 through September 2006

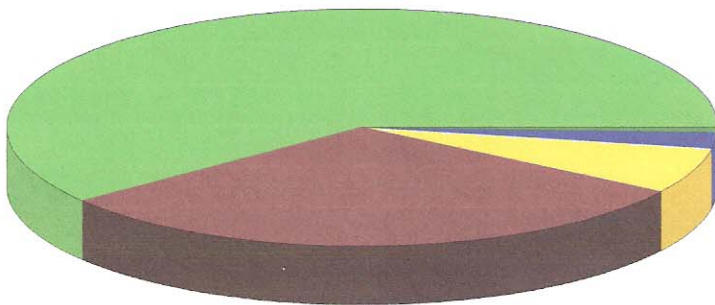
Income  
Expense

\$ in 1,000's



Expense Summary  
October 2005 through September 2006

Program Services	%60.74
Business expenses	30.35
Non-personnel expenses	6.21
Other personnel expenses	2.27
Travel & meetings expenses	0.43
Total	\$24,915.72



By Account



## Development Plan

### **Ensuring the Organization's Future:**

- Remember why we started the organization.
- Keep the spark alive: remember the mission and the needs the organization's programs fulfill.
- Spread the message:
  - Maintain Best practices in Ethics, Financials, Marketing, Programming and Safety.
  - Continue enrollment with associations such as NH Non-Profits, Worldwide Outfitters & Guides Assoc.
  - Provide continuing education for administrative, staff, and board members.
  - Implement good planning models.
  - Continue to use the Board of Director's Charter of Agreements.
  - Use the "council method" of coming together in board retreats.
  - Include some of the board members' "outside" activities (work, volunteer etc) in MSI's mission and implementation.

### **General Five-Year Development Plan:**

- Increase board membership.
- Implement the Carver Model for our board of directors.
- Clarify expectations of fundraising for all board members.
- Create a development committee.
- Continue to use Goal/Objective Sheets, (monthly, quarterly).
- Executive Director, board and interns actively seek funding through:
- Letter writing campaign, special events, in-person networking and solicitation, and grants.

### **Checks and Balances to Ensuring Accountability:**

- Increase board size.
- Develop an executive committee.
- Continue to keep open communication lines between board members.
- Continue regular board meetings conducted under best practices.
- Continue annual filings with Attorney General's Charitable Trust Division.
- File as needed with the IRS non-profit division.

### **Program, Financial and Growth Monitoring:**

- Develop a Program committee
- Develop active treasurer position
- Continue with financial oversight with bookkeeper and CPA
- Evaluation of progress, and revise goals as needed.



## Goals and Objectives

### GOALS

- Continue offering safe experiential programs with a high level of quality in a variety of settings: seminars, workshops, wilderness and challenge programs, lecture/film series, and the SunFest.
- Provide additional resources on our website and printed materials that further the mission statement, particularly regarding sustainable living.
- Expand programs
- Collaborate with qualified individuals and organizations in various communities.
- Provide scholarships for MSI and Outward Bound programs.
- Provide donations for selected community projects.
- Serve teens & adults in the community.

### OBJECTIVES:

- Double SunFest Festival visitors from 600 in 2006 to 1200 in 2007
- Double SunFest vendors from 45 in 2006 to 90 in 2007
- Provide two Sunapee Scholarships at a minimum of \$1500. for each student, for Outward Bound Programs, wherein Outward Bound pays the balance of program cost, (60%).
- Build MSI Scholarship Fund to \$12,500.
- Fill domestic and international programs with participants that have been fully logistically planned, organized, and are on the website.
- Conduct 21-day wilderness immersion programs for young adults in Utah, Washington, New England and Peru.
- Collaborate with two organizations also interested in developing a second SunFest in the Salt Lake City or Park City area of Utah.
- Initiate board activity regarding fundraising development.
- Bring the Peruvian Band "Chimu's" to the USA by establishing a 15-venue touring schedule for cultural and Andean music education, artist in residence for Universities, High Schools and Grade Schools.
- Provide monthly documentaries at MSI's Film Series.
- Conduct a board of directors community service project each year.
- Develop new programs where the Executive Director has experience and program outlines in Utah's Wasatch and Uinta Mountains, Hawaii's Haleakala Crater, France's Bay of Biscay, Switzerlan's Haute Route, Austria's Arlberg, and in Newfoundland
- Purchase remote and rustic basecamps for conducting hiking and touring activities in the following locations:
  - Remote octagon cabin, Albion Basin , Alta, Utah
  - Remote cabin, Lake Chesuncook, Northern Maine
  - Remote cabin, Central Newfoundland.



*Needs List - Start-up Phase II*

**MSI's Stage I:** We have developed a solid track record with initial programs and services, have established the basic business infrastructure, and have solid goals and objectives for the future.

**MSI's Stage II:** Donations and other funding will aid our continued start-up efforts and sustainability, and will put us in a position where we can continue to fulfill our Mission by expanding our programs and services.

**Table explanations:**

MSI's yearly startup needs for the next three years are indicated in columns 2, 3 and 4. Year '08, (column 3), reflects a full year's needs. The amounts decrease in year '09, (column 4), by 1.7% which is MSI's expected growth rate. Program revenues will begin to carry a share of company expenses. Explanations are on reverse side of table. MSI's fiscal year runs Oct 1<sup>st</sup> through Sept 30<sup>th</sup>.

<u>Item</u>	<u>Last Fiscal Yr</u>	<u>Crrnt ½ Yr</u>	<u>Year</u>	<u>Year</u>
		<b>(2007)</b>	<b>(2008)</b>	<b>(2009)</b>
<i>Projected Startup needs for Phase II</i>	Oct 2005 Sept 2006	April 2007 Sept 2007	Oct 2007 Sept 2008	Oct 2008 Sept 2009
<b>GENERAL OPERATING</b>				
<b>Office Rental/ utilities</b>	\$0	\$1,000	\$3,000	\$2,950
<b>Licenses/Permits/Fees(State and Local)</b>	0	750	1,500	1,475
<b>Marketing/Advertising</b>	5,000	9,000	18,000	17,700
<b>Executive Director Salary</b>	0	27,500	55,000	15,000
<b>Office Expenses</b>	1,546	2,250	4,500	4,425
<b>Marketing Director Salary*</b>	0	27,000	55,000	27,500
<b>Program Equipment</b>	0	5,000	5,000	4,900
<b>Intern Expenses</b>	0	3,000	3,000	2,950
<b>Insurance</b>	2,150	2,350	2,400	2,360
<b>Board expenses</b>	200	2,500	3,000	2,950
<b>Conference/Seminar Fees and Expenses</b>		200	400	390
<b>Newsletters</b>	0	500	1,000	980
<b>Program Coordinators</b>	200	3,000	6,000	5,900
<b>Office Assistant Salary</b>		750	14,400	14,155
<b>Bookkeeper</b>	566	475	950	935
<b>RESTRICTED CONTRIBUTIONS</b>				
<b>Scholarship Fund Sunapee High School Outward Bound Program</b>	0	2,000	3,000	3,000
<b>MSI Scholarship Fund</b>	55	2,500	5,000	5,000
<b>Grant writer Salary</b>	0	2,000	2,000	1,970
<b>Debt Retirement</b>	0	5,000	7,000	7,000
<i>Starred Items explained on reverse.</i>	<b>\$9,717</b>	<b>\$96,775</b>	<b>\$190,150</b>	<b>\$121,540</b>

*Mountain Spirit Institute Federal Tax ID number:02-0523431  
Mountain Spirit Institute is a 501-c-3 educational non-profit organization*

**Explanation of Needed Funding Start-up Phase II**

<b>Office rental/ utilities</b> Compensation to the executive director for MSI's use of premises and utilities
<b>Licenses/permits/fees, (state and local)</b> Currently there is a small office space in our residence. Office space in the immediate area will provide the needed space and resources for filing, organization and operation of a non-profit.
<b>Marketing/Advertising</b> Website promotion, advertising, brochures, printing expenses.
<b>Executive Director Salary</b> This compensation allows R. Richards to work full-time with sustainable effort on MSI development goals and action plans. Such elements will include program development, execution of existing programs, Web Site Design, administrative duties, marketing and Board development.
<b>Office Expenses</b> Internet, phone, utilities, postage.
<b>Marketing Director Salary</b> Doug Kibbie, an experienced in marketing executive will generate his own salary and jumpstart the organization's marketing in one year and a half. Resume available upon request.
<b>Program Equipment</b> Backpacks, cooking and safety equipment. No vehicles are in this plan.
<b>Intern Expenses</b> Colby Sawyer College (undergraduate), Antioch College (Graduate) programs to assist with program and general operation of office.
<b>Insurance</b> Liability insurance
<b>Board expenses</b> For meetings expenses and any travel stipends incurred
<b>Conference/Seminar Fees and Expenses</b> Programs at organizations such as New Hampshire Center for Non-Profits and Antioch College, Keene, NH Utah Nonprofits Association in Salt Lake City, Utah
<b>Newsletters</b> Monthly subscription for newsletter service.
<b>Program Coordinators</b> Staff have been volunteering their time so far, or with little compensation for their time. MSI's goal is, with increased traffic through the door, to compensate coordinators.
<b>Office assistance</b> Assistance is needed in daily tasks so the director can be freed up for program and organizational development
<b>Bookkeeper</b> Our bookkeeper has been simply reviewing our books. She would take a more active role in oversight and bookkeeping
<b>Scholarship Fund Sunapee High School Outward Bound Program</b> 50% matching program with Outward Bound and MSI for needed outdoor programs
<b>MSI Scholarship Fund</b> To establish funds for qualifying families and individuals who would like to participate in MSI programs.
<b>Grant writer salary</b> Paid on salary rather than commission, which is the standard ethical practice. Funds will be used to initiate our grant writing program underway.
<b>Debt Retirement</b> A three year program to pay the loan from R. Richards



*A Call to Action*

What you hold in your hands is my dream to facilitate the coming together of “givers”, (teachers, guides, facilitators, authors and speakers) with students and participants. Mountain Spirit Institute has been offering programs since 1998. Before MSI, I conducted successful experiential trips and mountaineering expeditions for Pacific Crest Outward Bound and Alpine Ascents International. I have built a reputation among my peers and participants for leading safe and transformational trips. I have logged many miles and teaching hours from New Hampshire to Washington State, from Peru and Bolivia as well as in the Alps for a number of years. MSI is growing and I am being joined by other highly qualified facilitators and teachers.

Now is the time to continue this dream and make the ideas a reality by creating a sustainable organization that creates lasting change for participants. There is a significant need at the local, state and national levels for community-building, facilitation of experiential education and connection to self, each other and the earth. Your contribution will help MSI fulfill this mission and sustain the organization. All contributions to this campaign are tax deductible. To date, I have loaned nineteen \$19,000 of my own funds plus years of labor to the Mountain Spirit Institute.

The visionary founder of Outward Bound, Kurt Hahn, from which MSI has received much of it’s inspiration, had this to say about education:

"I regard it as the foremost task of education to insure the survival of these qualities: an enterprising curiosity, an undefeatable spirit, tenacity in pursuit, readiness for sensible self denial, and above all, compassion." & "Education must enable young people to effect what they have recognized to be right, despite hardships, despite dangers, despite inner skepticism, despite boredom, and despite mockery from the world." [www.kurthahn.org](http://www.kurthahn.org)

*A wilderness expedition, meeting village elders in Peru, a problem-solving event for busy executives, or a rock climb on a granite face and attending a weekend workshop on shamanism, seeing a documentary at our film series are all opportunities that can provide life changing events and a “laboratory for personal disarmament and growth”, as well as a road to healthier community. A short powerful experience facilitated by skilled instructors can have a lasting, life changing impact on participants. I have experienced it on courses lasting from one day to three months.*

Be a part of the dream and contribute to this worthy cause of experiential education of the body, mind and spirit. Please contact me, MSI’s Founder and Executive Director, and contribute to this unique dream in a way that meets your personal goals of philanthropy.

Respectfully,

Dexter Randall Richards

# Mountain Spirit INSTITUTE



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