



2017

Annual

Report

The Balsam Mountain Trust—A Year in Review, 2017

Balsam Mountain Trust

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Co-Education Directors &
Senior Naturalists

Bethany Sheffer
AmeriCorps Service Member

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Overview:

The wonders, complexities and challenges of the natural world, and humanity's place (and role) in it, continued to be the primary focus of the Trust as an organization in 2017—as it has been throughout the history of this organization.

Whether it was:

- 1) Conservation education program planning and presentations
- 2) Undertaking the remodeling of the Nature Center
- 3) Stewarding the vast array of natural and cultural resources on the Preserve
- 4) Monitoring and soliciting scientific research projects
- 5) Tracking and evaluating the status of the Trust's Strategic Plan or
- 6) Getting outside to enjoy the amazing wonders of the natural world...

...the Trust staff and Board of Trustees maintained its vigilance of its nonprofit status—one of providing public benefit to BMP members and owners, area schools and the public audiences in general which we reached.

We are also so very fortunate to have had the continued support from so many generous donors. BMP members and owners corroborated their support by way of financial contributions to our Annual Ask, the Metamorphosis and Annual Parties, as well as by participating in Trust programs throughout the year.

The Trust is so very thankful for everyone's continued support and, the Board of Trustees and executive director continue to keep proactive, mindful eyes on stewarding your gifts responsibly while remaining committed to the Trust's mission.

The Trust Mission:

The Balsam Mountain Trust inspires people to be responsible stewards of the natural and cultural resources of the southern Blue Ridge Mountains through education and conservation leadership.



Thoughts from Janie Stratigos, Trust Board Chair

2017 was a momentous year for the Balsam Mountain Trust and we are already looking forward to an exciting 2018! As everyone must know by now, we were able to purchase our old Nature Center and are in the process of remodeling the building and introducing new and exciting environmental education exhibits. We can't wait to show everyone when its completed in 2018.

While our staff was busy working on the Nature Center, they still found time to continue to provide fascinating conservation education programs for both the Preserve community members and all our constituents outside the Preserve. The Trust introduced two new member programs in 2017—Garden Club and Naturalist-for-a-Day. In addition, we hosted nine fabulous Trust Talks, which included two Artist-in-Residence programs and the fantastic solar eclipse talk and viewing the following day (both were attended by record-breaking crowds). We have more new programs for members for 2018, so stay tuned.

In addition to member programs, the Trust continued its commitment to provide programs for folks in Jackson and Haywood counties. We had ten Adopt-a-School and two Pollinator sites in the two counties, serving first, fourth and fifth grade students. Our Birds of Prey, library and other public programs delighted an additional 6,000 people. What a tribute to our limited staff!

On behalf of the Trust Board and staff, we thank you! Your ongoing support allows us to meet these incredible milestones and sustain our work on the Preserve and in the surrounding communities.

I hope you enjoy our 2017 Annual Report.

Best,

Janie





At the core of everything the Trust does, its education programs, scientific research and natural and cultural resources stewardship programs are the components of the engine that drive it. In this annual report you will find mentions of each of these but by far, the education programs the Trust presents are the meat and potatoes of our mission at this point in the Trust’s story.

As you read this report please keep in mind too, that any staff person or Trustee is always willing to discuss the ‘nuts and bolts’ of Trust operations.

2018 then brings the Trust’s story somewhat full-circle as we have purchased, and began the remodel of, our permanent home, affectionately referred to as N.C. 2.0.

Trust Education Programs

2017 was another great year for *Edutainment!* In 2016 we completed a strategic plan that helps guide Trust operations and environmental education (EE) was designated as the top priority. Our mission for EE is to provide programming which encourages active environmental conservation in our region.

Our EE programs serve three primary groups: members, schools and the general public. We are happy to report that in its seventeen-year existence, the Trust has reached nearly 90,000 people - 9,000 of those participated in 2017 programs.

Program categories:

Member Outings: We realize that each person’s relationship with nature is unique and we offer many different program types to connect with

our members. In 2017, folks enjoyed hiking, Feeding Frenzies and other special outings in addition to our popular children’s summer camps.



©2017 Jim Stratigos

Trust Talks continued to be a favorite, with a record-breaking 170 people at Jim Stratigos’ once-in-a-lifetime solar eclipse talk! Proof that even the most ephemeral moments in nature can captivate and inspire us. Members also participated in Walk for Wildlife, helping us to raise funds for local conservation yet again! The 2017 grant recipient was Southern Appalachian Raptor Research. They will use the funds to further their research on neotropical migrants, including rap-



tors, and to educate the public on the importance of these amazing creatures. We also offered some new programs including: Biologist-for-a-Day, Lunch and Learn, Geo-caching

and the very popular Trust Garden Club. Through these new programs we reached BMP members that hadn’t typically participated in Trust offerings. We also tried to vary the types of hikes we offered, including Choose Your Own Adventure and Dog Hikes.

In a continued effort to understand the value members place on the Trust, and the programs they prioritize, we offered a survey to members of the BMP community. We received 83 responses and were pleased to learn that the Trust is highly valued by the BMP community. Comments included:

“It (the Trust) is the soul of Balsam.”

“(The Trust) unifies the community and provides a sense of purpose.”

“This is what attracted me to Balsam the most: nature, the trails, animal ambassadors.”

We have incorporated this feedback into our programming and exhibit design of NC 2.0.

Public Outreach: 2016 people realized another increase in our public (non-school) participation, and this trend continued in 2017. We have developed strong program partners and continue to deliver our flagship programs to local libraries, summer camps, scout groups and visitor centers.

We also continued our 4th and 5th grade Adopt-a-School program and 1st and 2nd grade monarch butterfly program, reaching ten schools and more than 1,800 students - all at no cost to the schools. All public elementary schools in Jackson County are designated Title I, indicating that greater than 35% of the students live below the



poverty line. That percentage can be as high as 90% in some of schools. Educators informed us that these programs fill

a much-needed gap and that they use our program messages throughout the year in their classrooms.

"The students greatly benefit from this program as they have limited opportunities in their day to day lives. This program allows them to make connections to their surrounding communities and their natural environment that surrounds them."
Educator Lindsay Button, The HUB School, Jackson County

Although we have developed many partnerships in the region, we are always looking to improve and to discover new groups that we can inspire. As a part of our strategic plan, an education committee was formed which consists of local teachers, curriculum coordinators and environmental education experts.

AmeriCorps: 2017 was the third year the Trust was chosen as an AmeriCorps host site. Our AmeriCorps member delivers EE programming to under-served communities and has allowed us to more than triple our reach.



Bethany Sheffer was so pleased with her service here in 2016-17 that she re-applied for (and was awarded) the 2017-18 term.

In addition to delivering most of the Adopt-a-School and pollinator programs, Bethany also strives to find under-served groups that would benefit from our programming. This year she created several novel library programs, in addition to a new partnership with the local REACH shelter for abused women and children. She also hosted "Bird Fest", the Trust's first-ever community festival. It was held in conjunction with myriad festivals world-wide in celebration of International Migratory Bird Day. With lessons learned in 2017, we plan to make Bird Fest bigger and better in 2018!

Volunteers and Interns: We would like to give an enthusiastic thank you to our animal care volunteers! Without them, we would not

have the time to offer nearly as many education programs. In 2017 we had 13 volunteers contributing 615 hours at an estimated cost savings of \$15,000.



Look for these wonderful team members when you visit the Trust!

In 2017 we also added a field biology internship program and hosted four students from local

high schools and universities. They covered interesting topics including: stream water quality,



salamander diversity, mammal diversity, and density/diversity of wild flowers in our new Balsam Wildflower Plots.

Our volunteer and internship programs are not only beneficial to the Trust, but to the participants as well. We think of these programs as an



extension of our educational outreach efforts and as a chance to help kick-start the careers of young people interested in the field!



2017 Was Nothing if Not Celebratory

The Trust celebrates its birthday every year and it is always one of the biggest, funnest and most popular get-togethers on the Preserve. In 2017, however, the Trust had an equally fun reason to cheer and that was to celebrate moving (back) into our permanent home. The Trust was able purchase its former home with the help of Ken Bowdon and many BMP members—who have both given so generously annually as well as at our Metamorphosis Party. This created the opportunity for Trust staff and Board of Trustees to create a vision for a facelift. Plans were designed and drawn up with a goal of beginning the remodel early in 2018. And the Trust owes a debt of gratitude to architect Shawn Leatherwood and his Architectural Studio for the pro bono design work



(Continued on page 7)

<i>Program Type</i>	<i>Programs Offered</i>	<i>Total Attendance</i>
<u>Member Programs</u> Interpretive hikes and other outings, trust talks, and NC programs (feeding frenzies, Biologist-for-a-Day, Garden Club, summer camp, etc.)	146	1,023
<u>Nature Center Drop-In Visitors</u> Members and guests drop in and we give them a tour of Nat. Ctr.	31	77
<u>Adopt-a-School</u> 4th – 5th grade	65	1160
<u>Pollinator Program</u> 1st – 2nd grade	28	647
<u>Schools (other) and Public</u> Outreach visits and field trips (Pre-K – college, scouts, summer camps, libraries, visitor’s centers, and public programs on Preserve)	122	6205

they've provided. Look for a grand opening in 2018.

Many of you got a sneak preview of the exhibits



we have planned at our Labor Day Metamorphosis Party. We are so grateful to the more than 50

people that came to celebrate and contribute to our vision. THANK YOU as always for your incredible support! Our members are who make the Trust possible. There will be updates and more news about the progress of the remodel throughout 2018 coming in *Nature-Phile* and your email so be on the lookout for those.



The 'new' Nature Center will be built with you in mind. The theme we keep returning to is Balsam

Backyards. We envision taking you all on a journey that starts with a step from your back porch and carries you into the natural environs of the Preserve. Through great feedback from our member survey as well as comments from you all throughout the years, we hope to create a space that is tailor-made for Balsam homeowners. We want the Nature Center to be more than just a space that you take guests when they are in town. We want it to be a dynamic learning center resource that you return to again and again.

The Annual Trust Party

The 2017 Trust Party was meant to be a low-key affair and turned out to be anything but as BMP members turned out in large numbers and were

festooned with their philanthropic hats—as well as a few other festive costumes donned in the spirit of party theme: Black and White Ball.

The Trust continues to be humbled by the show of support and generosity among BMP members and owners. And what we really like is the willingness of the revelers to get into the spirit of the celebration every year. This party can best be summed up in the following photos:



Resource Stewardship

The challenges of stewarding the natural resources on the Preserve remained somewhat problematic in 2017. The Trust continued to monitor for invasive species on property and, fortunately, there was no bad news. And the good news is that, overall, the Preserve is in pretty good shape as relates to the number and type of these unwelcome guests.

In an effort to stem the tide (and growth) of invasive plants on the Preserve and, in the spirit of community cooperation, the Trust partnered with

the Club and the Community Association to engage a botanical private-eye in 2017. This contractor, who has worked for the Trust in the past, will work during the 2018 field season to begin eradicating certain of these invaders.



The principal (botanical) invaders, with which eradication protocols will be employed are: Tree-of-Heaven, princess tree, kudzu, Japanese honeysuckle, Japanese stilt grass, English ivy, Japanese barberry, Chinese silvergrass, silverthorn, multiflora rose, oriental bittersweet, bull thistle, cinnamon vine, Japanese spirea and coltsfoot.

This project, along with our ongoing field research with ramps and ginseng, provides people with a forum for discovery and even how individuals can contribute to stewardship the natural and cultural resources found on the Preserve.

Trust Animal Ambassadors



The message that the education programs of the Trust provides to its audiences is particularly enhanced by the privilege of having some incredible animal ambassadors. These living wonders of the natural world allow audiences the opportunity of seeing our other 'staff' members up close and personal. Often, this is the only time some people will get to see animals like this. What our ambassadors also do, is provide the impetus to plant seeds of curiosity and, hopefully, grow that interest into

lifelong stewardship of the natural world. A world in which we all depend on the



health and sustainability of all life on Earth.

We encourage each of you to visit with the Trust and take some to explore the wonders we have in residence as well as what is all around us in western North Carolina.

2017 Financial Statement

Operating Revenue

Contributions: individuals, businesses, foundations	\$ 181,109
Events, auctions, ticket sales	\$ 43,725
Gifts-in-Kind	\$ 4,987
Program Revenue	\$ 23,953
Other, e.g., grants, etc.	\$ 9,429
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Total Operating Revenue	\$ 263,203

Operating Expenses by Program

Education	\$ 81,511
Fundraising	\$ 21,209
Gen & Admin	\$ 73,792
Nature Center	\$ 22,842
Resource Stewardship	\$ 9,145
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Total Operating Expenses	\$ 208,498
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Purchase of Nature Center	\$ 200,000
Depreciation	\$ 10,827

2017 Trust Supporters

*The Balsam Mountain Trust would like to acknowledge and thank the donors listed below who contributed to the Trust's success in 2017. Every attempt has been made to provide accurate information about donors and amounts of their gift. Please contact us if you notice any errors of fact or omissions. (*denotes Trustee)*

Eagle Club

(\$10,000 and above)

Anonymous

Jayne Parker & Beckie Yon

The Walt Disney Foundation

Terri & David May

Black Bear Club

(\$5,000—\$9,999)

Marianne Lyon & Rob Howard,

Linksy, Levinson, Rosenblatt families

Hal & Kate Reed Foundation

Bobcat Club

(\$2,500—\$4,999)

Mary & Dan Connell, Drs. Catherine Enright & Walton Reeves, Jan Kohl & Dr. Robert Farquharson, Jackie & Bob Fitts, Pam & Mike Frey, Linda & *Ed James, Krey family, DonnaJean & Bill Mamrack, Mary McGuire & Dennis Brand, Suzanne & Dr. John Morse, *Linda Outlaw & David Kitchens, Holly & Greg Pollock, *Janie & Jim Stratigos, *Sheri & Dave Straw, Martha & Mike Summerford, Jennifer & Steve Weyreter

Whitetail Deer Club

(\$1,500—\$2,499)

*Mary & Larry Arbaugh, Mary & Marshall Bassett, Julie & Sam Belfore, Anne & Jim Kistler, Elizabeth & Jay Monge, Laura & Brian Philips, Karen & Andrew Manidis, Linda & Mac Purdy, Beth Sorrentino & Michael Skinner



Brook Trout Club

(\$500—\$1,499)

Kay & Dr. Robert Abney, Elektra & Mills Ariail, Gale & Dr. Stephen Barnett, Mirtha Casimir & Jack McKinley, Dianna & Dr. Richard Dunn, Drs. Mary & Don Edmondson, Julie & Mark Evans, Karen & Bob Hannan, Carol & John Landers, Nancy & Steve Neubeiser, Nancy & Wayde Seidensticker, Louise & Dave Sparks, Shellee & Richard Starr, Sharon & Ken Torok, Cindy & Al Tunstall, Sabrina Watkins & Jim Watson

Monarch Butterfly Club

(up to \$499)

Peter Bates, Ph. D., Drs. Andi & Rob Colton, Sharon & Paul DeBacco, Elaine & Michael Fulbright, Sheri & Eric Krueger, Donna & Rowdy LeMoine, Tammy & Dr. Mark Miles, Leslie & Jim Moster, Lynn & Thomas Pokorny, Margaret Trehern, Debra & Mark Vagasky, Cathy & Dr. Buddy Wikle

Trust Party Winning-Bid Donors

Lisa & Chris Anderson, Elektra & Mills Ariail, Balsam Mountain Club, Gale & Dr. Stephen Barnett, Mary & Marshall Bassett, Mirtha Casimir, Drs. Andi & Rob Colton, Dianna & Dr. Rich Dunn, Jan Kohl & Dr. Bob Farquharson, Cynthia & Dr. Roy Gallinger, Karen & Bob Hannan, Nancy & Steve Ison, Linda & Ed James, Anne & Jim Kistler, Linda Outlaw & David Kitchens, Carol & John Landers, Donna & Rowdy LeMoine, DonnaJean & Bill Mamrack, Karen & Andrew Manidis, Teri & David May, Elizabeth & Jay Monge, Suzanne & Dr. John Morse, Leslie & Jim Moster, Laura & Brian Phillips, Beth Sorrentino & Michael Skinner, Shellee & Richard Starr, Janie & Jim Stratigos, Sheri & Dave Straw, Martha & Mike Summerford, Cindy & Al Tunstall, Sharon & Ken Torok, Sabrina Watkins & Jim Watson, Cathy & Buddy Wikle

Trust Party Sponsors

Historical Concepts, Kathryn Greeley Designs, Platt Architects, Morgan-Keefe Builders, J. Scott Campbell Construction Company

Trust Auction Item Donors and Organizers

Paul Anderson, Stephen Barnett, Ken Bowdon, Rod and Louise Hanlon, Nancy Ison, Linda James, Sharon Torok

Adopt-a-School Donors

Dr. Roy Gallinger, Wells Fargo Foundation, Cullowhee River Club, Jack Bishop at Edward Jones, Dr. Spilliards, DMD, PA at Cashiers Family Dental, Taylor Ford, Lisa Ferguson at Edward Jones



The Trust Board of Trustees and Staff want to thank each of you who supported the Trust in 2017, which allowed us to continue to meet our mission.

