

2021 Annual Report



A Note From Your Board Chair

In 2021, Balsam Mountain Trust emerged from a most restrictive pandemic year with strong virtual and in-person programs for our Balsam Mountain Preserve community and the broader region. Thanks to our generous community we struggled less than many non-profits both financially and in terms of participation. But there were struggles. Our Trust team rose to the challenges with virtual programming, fun outdoor exhibits at the nature center, “pod group” hikes and much more. As always it was a great time to go to the Nature Center, spend time with Michael, Rose, Jen, Rachael, and the student volunteers, and to explore the richness of what’s there for you both indoors and out.

We can all be proud that the mission continued in 2021. We continued research on the resilience of our ecosystems. We continued Trust Talks that helped owners learn more about the specifics of conservation and stewardship here, e.g., stream quality, forest fire risk, the value of native plants, and invasive species risk. We learned about the value of roadside mowing protocols for wildflowers and have restarted recycling successfully. Artists continued to eloquently describe and visualize how nature connects us to beauty and we succeeded in recording some of the Trust Talks, so if you missed them, do check out the videos.

Our annual fund-raising party was again extraordinary – for the fun we had, the art and good food we enjoyed, and the funds we raised. Wow! Thank you to party chair, Kathy Nervie, and to everyone who helped set up, donated to the auction, and stirred up the bidding!

Balsam Mountain Trust has had many board chairs since we began in 2000,



Thoughts From Your Executive Director

For about the last 3.42 billion years, life on planet Earth has charted strange and wondrous paths, which have brought us to this point in its existence. And for the last 21 years of that existence, the Balsam Mountain Trust has attempted to chart its own course to bring the wonders of life on Earth to its stakeholders. We’ve worked hard to stay true to our mission by continuing to offer educational opportunities for BMP owners and our neighbors outside the Preserve, along with research discoveries. For 19 of those 21 years, it has been my privilege to lead this small but powerful organization. As I reflect on those years, three of the many things we’ve accomplished that have mattered most to me are:

- 1) Establishing a well-respected education program component which utilizes the skills of a professional staff and a group of living animal ambassadors.
- 2) Creating a stable of research projects that have broadened our knowledge and understanding of the natural and cultural resources on the Preserve and
- 3) Helping to create a go-to resource for BMP owners, the developer of record and other Preserve staff, to provide consulting services related to stewarding the resources found on the Preserve.

You’ll see in this annual report a review of the year which encompasses the ongoing projects, activities and engagements with which the Trust is involved.

Humanity is faced with myriad ecological challenges, and the Trust is the local resource for BMP owners by which they can keep an ‘ear to the ground’ related to both the neighborhood (the Preserve, think—locally) and the world (the planet, think—globally).

The challenges we face can only be met with the consistent support of each of Earth’s

A Note From Your Board Chair, con't.

and as I reflect back, I am so thankful for each one's contribution to the strength of this small-but-mighty organization. Michael Skinner will leave a powerful legacy as he moves toward his retirement in 2022. Be ready for celebrating his contributions in 2022!

Being on the Board has deepened my understanding of the importance of our Trust team in protecting our ecosystems and the truly unique Preserve that we are privileged to enjoy. It's great to look forward and see great things happening under Sheri Straw's leadership, especially as we search for a new executive director at a time of growth in the Preserve. We need someone to lead us as our community grows larger, builds more, and experiences changes in our forest. We'll need knowledge of conservation, environmental education, and research within the team and within our community to do all of that well. And that is all doable, thanks to all of you who contribute in so many ways to the mission of Balsam Mountain Trust.

- Sabrina

"If you want to build a ship, don't herd people together to collect wood and don't assign them tasks and work, but rather teach them to long for the endless immensity of the sea."

- Antoine de Saint-Exupéry



Thoughts From Your Executive Director, con't.

citizens. The resource stewardship efforts requires education on many fronts for us to stay out in front of the co-morbidities we face as species.

Each of you who call the Preserve home, at whatever level, should, I suggest, avail yourselves to the multi-faceted aspects of the Trust. Any Trustee or staff person is more than willing to share with you the importance of this organization and how it can help inform you and, help to protect the investment you've made on the Preserve. Come See Us!

- Michael



Balsam Mountain Trust

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Trust Staff

Michael Skinner
Executive Director

Rose Wall, Jen Knight
Co-Education Directors &
Senior Naturalists

Rachael Hart
Administrative/Naturalist
Assistant

Nicole Cook, Emily Taylor
AmeriCorps Service Mem-
bers

Board of Trustees –2021

Sabrina Watkins, Chair
Sheri Straw, Vice-chair
Mary Staton, Secretary
Jan Kohl, Treasurer
Stephen Barnett, M.D.
Rob Colton, M. D.
John Morse, Ph. D.
Kathy Nervie
Chip Schuppert



Measures of Success in 2021

The Trust staff is guided by the direction set by the Board of Trustees. In 2021 we accomplished:

- 1) Nature Center remained open as much as possible during the continuation of the Covid-19-induced lockdown
- 2) Interesting, topic-variety series of its annual Trust Talk lectures which included artist-donated pieces of their work to the Trust's permanent collection.
- 3) The crafting and presentation of an eclectic, fun and educational slate of programming which included interpretive hikes, roadside wildflowers, animal ambassadors interaction and virtual classes.
- 4) Public education presentations were to mostly virtual presentations to audiences in a five-county area in western North Carolina which continued to receive rave reviews from participants.
- 5) Research initiatives included a study of caterpillars and how they use the flora for foraging and a study of dark fireflies. Both studies, begun in 2020, were continued by Western Carolina University professors and their students.
- 6) Hosting of the AmeriCorps Service program which facilitates the Trust reaching underserved students in Jackson and Haywood Counties.
- 7) The continued partnerships with local businesses to fund our Adopt-a-School and Monarch/Pollinator Initiatives.
- 8) Annual Trust Birthday Party realized a record fundraising amount! THANK YOU BMP members, sponsors, volunteers and Preserve staff!
- 9) Successful maintenance and health of the Trust's animal ambassadors.
- 10) Hired Rachael Hart as the Trust's new Administrative/Naturalist Assistant
- 11) Realized an increase in visitation from new BMP owners, which created friend-raising opportunities.

In nature, silence is loud. You can sit and enjoy the subtle sounds that surround you. Deep in the woods, there is a peace and harmony that doesn't exist in the city or anywhere around human habitats. The best way to experience the divine is through the silence.

Anonymous

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.

Education Programming Report

Rose Wall and Jen Knight, Education Directors and Sr. Naturalists

Our mission for environmental education (EE) is to provide programming which encourages active environmental conservation in our region.

We serve three primary groups: BMP owners, educational institutions and the general public. 2021 realized an easing-off of the strictest pandemic protocols which allowed us to start making our way “back to normal”. As educators, we were excited and relieved to have more opportunities to interact directly with folks on and off the mountain.

NC 2.0: All planned indoor and outdoor exhibits for the Nature Center



2.0 renovation project have been completed. The last of the signage and the interactive outdoor Discovery Stations have been installed but that doesn't mean there's nothing new to which to look forward. We are always sprucing, updating, and changing out seasonal displays to keep

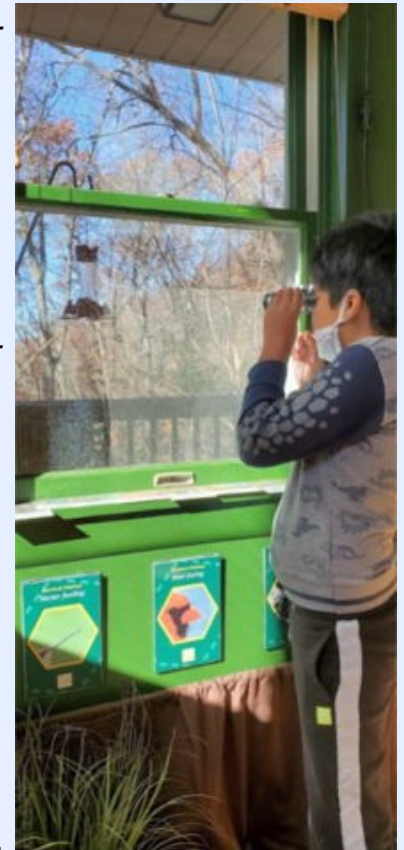
the Nature Center exciting and relevant for the Preserve community.

Member Programs: We were so excited to reopen the Nature Center and have visitors again as drop-ins went up 65% from 2020! We also ramped up in-person offerings over the course of the year including Trust Talks, wild food foraging, Appalachian ghost stories, synchronous fireflies, and of



course, the Trust Party at the Summit House. As part of “easing back in” to our standard programming, we offered half-day camps every other weekend in the summer. After a year of building projects and zoom calls, we were ready to get out in the creeks and get crafting! The Walk for Wildlife Challenge came back in treasure hunt form and intrepid explorers solved riddles to discover caches of regional crafts, conservation swag, and camping gear. Participants also raised \$1,500 to fund the Walk for Wildlife Grant for regional conservation.

Greening up the Mountain: We hosted our fourth annual plant sale, making it easier for homeowners to purchase interesting native plants that help improve wildlife habitat on their properties. The funds we raise from the sale are used to purchase plants to enhance the nature center and pollinator gardens. This year, we used funds to purchase more than 60 plugs to enhance prominent Roadside Wildflower beds. We also continue to chair the Green Team which helps to bring community action



to sustainability on the mountain with representatives from the Trust, CA, and Preserve. This committee was largely on hiatus during the height of the pandemic. However, we worked together remotely to develop signage for the wildflower beds and champion new ways to recycle on the mountain with the cork and battery recycling programs.



Public Outreach: We devoted lots of time to establishing new sponsorships for our Adopt-A-School program. In 2020, we lost the majority of sponsors to the economic hardships of the pandemic closures and Balsam residents stepped up to fund this critical program - these programs reach 4th and 5th graders at 9 of our local Title 1 schools at no cost. With support from the Board and Developer's office, we recruited the 7 sponsors we needed to keep the program going. All of the public elementary schools in Jackson County and Haywood Counties are designated Title I, indicating that greater than 35% of the students fall below the poverty line. Teachers inform us

that these programs fill a gap in curriculum and that they continue to use our program messages throughout the year. And student assessments continue to show a positive gain in knowledge and attitude. We were able to conduct more of our AAS programming in person in 2021 and give students the best experience with live animals.

Marcia Lehman, 4th, Fairview Elementary:
“My students loved the presentations and learned so much. We refer often to one of the presentations as we continue our year-long study of animals.”

Jo Hamilton, 4th, Scott's Creek School:
“These programs are so valuable for teachers because it helps give students an experience with important science curriculum for which we have no resources. The cost of field trips is becoming prohibitive, so we are thankful that the Balsam Mountain Trust can bring the experience to us.”

Our public program bookings increased over the summer and outreach numbers began starting to return to pre-pandemic levels. Libraries weren't ready for in-person programming yet, but we were able to put together a full-length virtual program that was made available to the public through two county library systems.

AmeriCorps: This is the seventh year that we've been awarded designation as an AmeriCorps host site. Our AmeriCorps member delivers EE programming to our underserved communities in the region and has allowed us to more than triple our



reach – Wow! In addition to delivering most of the Adopt-a-School and pollinator programs, our member also strives to connect with underserved groups throughout the region. Nicole Cook completed her second term with us, and we welcomed our newest member, Emily Taylor, for the 2021-2022 term. Nicole completed the work necessary to pilot our 1st grade pollinator curriculum kits and passed the baton to Emily.



Volunteers: After a moratorium on new volunteers (because of the pandemic), we reopened volunteer applications at the end of 2021 and also hosted a summer animal care intern.

We think of these programs as an extension of our educational outreach efforts, as a way to kick-start the careers of young people interested in the field and, to allow staff time to be utilized in other important areas of the Trust's mission. We are looking forward to having our full volunteer complement back soon!



2021—Education Program Stats

Education programming with the Trust is fluid and dynamic, i.e., we never know, from one year to the next, what type of participation we'll have in many of our programs, who might request a program, etc. This means then that our programming numbers reported in this document will fluctuate from year to year. Trust stakeholders should be confident, however, that Trust staff maximize opportunities to provide the 'public benefit' required for the maintenance of our 501 (c) (3) nonprofit status.

What follows are the end-of-year totals for programs and attendance in 2021.

Program Type	Programs Offered	Total Attendance	Additional Notes
<u>Member Programs</u>	110	1,111	Increase of 54% from 601 from 2020
<u>Drop-in visits to the Nature Center</u>	178	681	Up 65% from 2020
<u>Adopt-a-School</u> 4th—5th grade	56	1,597	Offered at no cost to schools through sponsors
<u>Pollinator Program</u> 1st—2nd grades	2	76	Offered at no cost to schools through sponsors
<u>Schools (other) and Public</u>	54	2,776	49 in-person, 5 virtual

“If you think education is expensive, try estimating the cost of ignorance.”

— Howard Gardner

“Live as if you were to die tomorrow. Learn as if you were to live forever.”

— Mahatma Gandhi



2021 Financial Statement

Operating Revenue

Contributions: individuals, businesses, foundations	\$ 259,150
Events, auctions, ticket sales, Gifts-in-Kind	\$ 85,235
Program Revenue	\$ 12,142
Other, e.g., grants, interest, etc.	\$ 379

Total Operating Revenue \$ 356,906

Operating Expenses by Program

Education	\$ 87,485
Fundraising	\$ 14,698
General & Administrative	\$ 61,865
Nature Center	\$ 45,224
Resource Stewardship	\$ 5,008
Unclassified/Employee-related	\$ 1,864

Total Operating Expenses \$ 215,309

Net Income (Loss) \$ 141,597

2021 Donors (Annual Ask, Auction Winners and Trust Party Ticket Purchasers)

The Balsam Mountain Trust would like to acknowledge and thank the donors listed who contributed to the Trust's success and fulfillment of its ongoing mission.

(Note: Every attempt has been made to provide correct information about donors and amounts of their gifts. Please contact us if you notice any errors of fact or omissions.)

Eagle Club

(\$10,000 and above)

Jayne Parker & Beckie Yon, The Walt Disney Foundation, Anonymous, Sabrina Watkins/Jim Watson

Black Bear Club

(\$5,000—\$9,999)

Patricia and Mike Dilick, Marianne Lyon & Rob Howard, the Harold Sweatt Foundation (Kate & Hal Reed), Mary & Bill Staton, Sheri & Dave Straw

Bobcat Club

(\$2,500—\$4,999)

Bill & DonnaJean Mamrack, Jan Kohl & Bob Farquharson, Martha & Michael Summerford, Linsky/Levinson families, Suzanne & John Morse

Whitetail Deer Club

(\$1,500—\$2,499)

Cindy & Chip Schuppert, Janie & Jim Stratigos, Kimberly & Rick Zimlich, Teresa & David May, Meg & Gary Moskovitz, Karen & Andrew Manidis

“The next time you want to withhold your help, or your love, or your support for another for whatever the reason, ask yourself a simple question: do the reasons you want to withhold it reflect more on them or on you? And which reasons do you want defining you forevermore?”

- Dan Pearce

Brook Trout Club

(\$500—\$1,499)

Ann Baruch, Sharon & Paul DeBacco, Tesa & Jon Oechsle, Sandy & Nathan Leder, Lou & Thomas Grady, Electra & Mills Ariail, Lisa Berger, Michael & Elaine Fulbright, Donald & Mary Edmondson, David Kitchens & Linda Outlaw, Ed & Edye Haddock, Doug & Teresa Franklin, Alexandra Heller, Erin & Michael Shaffer, Shellee & Richard Starr, Robert Taylor

Monarch Butterfly Club

(up to \$499)

Bobby & Connie Crowell, Barry Fox, The Montessori School, Mark Sembler, Margaret Trehern

Trust Auction Winners

Anderson, Chris & Lisa (Redfin), Arbaugh, Larry & Mary, Bassett, Mary & Marshall, Bradley, Joel and Kristen Barber, Brannon, Joe, Crowell, Bobby & Connie, Crofts, Jacob, DeMartino, John, Teresa & Doug Franklin, Edmondson, Donald & Mary, Jan Kohl & Farquharson, Robert, Gallinger, Roy & Cynthia, Halevy, Sally, Harrison, Susan and Shawn, Hart, Lucy, Hayes, Lawton & Nancy, Howard, David, Ison, Steve & Nancy, Kitchens, David & Linda Outlaw, Lemoine, Rowdy & Donna, Mamrack, Donna Jean & Bill, Manidis, Andrew & Karen, Moster, Jim & Leslie, Nervie, Michael and Kathy, Petersen, Patti, Taylor, Robert, Schuppert, Cynthia & Chip, Staton, Bill & Mary, Stratigos, Janie & Jim, Straw, Sheri & Dave, Torok, Ken & Sharon, Vagasky, Debra & Mark

Business Sponsors & Trust Party Ticket Purchasers

Alchemy Design Studio, Anderson, Chris & Lisa (Redfin), Arbaugh, Larry & Mary, B H Landscapes, Barnett Stephen & Gale, Bassett, Mary & Marshall, Belfore, Sam & Julie, Berger Lisa, BMP Real Estate Holdings, Bowdon Ken & Bobbye, Bradley, Joel & Kristen Barber, Brannon Joe, Colton, Robert & Andrea, Connell, Daniel & Mary, Countryside Animal Clinic Inc., Craige, Crawford, Crofts, Jacob, DeMartino, John, Dilick Michael & Patricia, Doty, Melinda, Teresa & Doug Franklin, Fulbright, Michael & Elaine, Gallinger, Roy & Cynthia, Giannoplis, Dianne, Halevy, Sally, Harrison, Susan and Shawn, Hart Lucy, Hayes, Lawton & Nancy, Haywood Landscapes, High Country Furniture, Howard David, Imperial Security and Wiring, Inc., Ison, Steve & Nancy, Jevsevar Karen, John Burgin Construction, Carol & John Landers, Kitchens, David & Linda Outlaw, Kohl, Jan & Bob Farquharson, Lemoine, Rowdy & Donna, Mamrack, Donna Jean & Bill, Manidis, Andrew & Karen, Marshall Gordon, Marvel, Patty, Matzick, Barbara & Scott Huse, Casimir, Mirtha & McKinley, Jack, Morgan Keefe Builders, Morse, John & Suzanne, Moster, Jim & Leslie, Motion Makers, Nervie, Michael and Katherine, Neubeiser, Steve & Nancy, Noonan, Rene, Petersen, Patti, Platt Architecture, Pokorny, Sharon and Tomas, Schuppert, Cynthia & Chip, Shawley, Patricia, Shick Construction, LLC, Slafsky, Deborah, Stanberry Insurance, Starr, Shellee & . Staton, Bill & Mary. Stephens S Farrell, Stratigos, Janie & Jim, Straw, Sheri & Dave, Swope, Susan, Taylor, Virginia, Tozlosky Family, Tuckaseegee Fly Shop, Vagasky, Mark, Watkins, Jim & Sabrina, Waynesville Automotive, Yon, Beckie & Jayne Parker