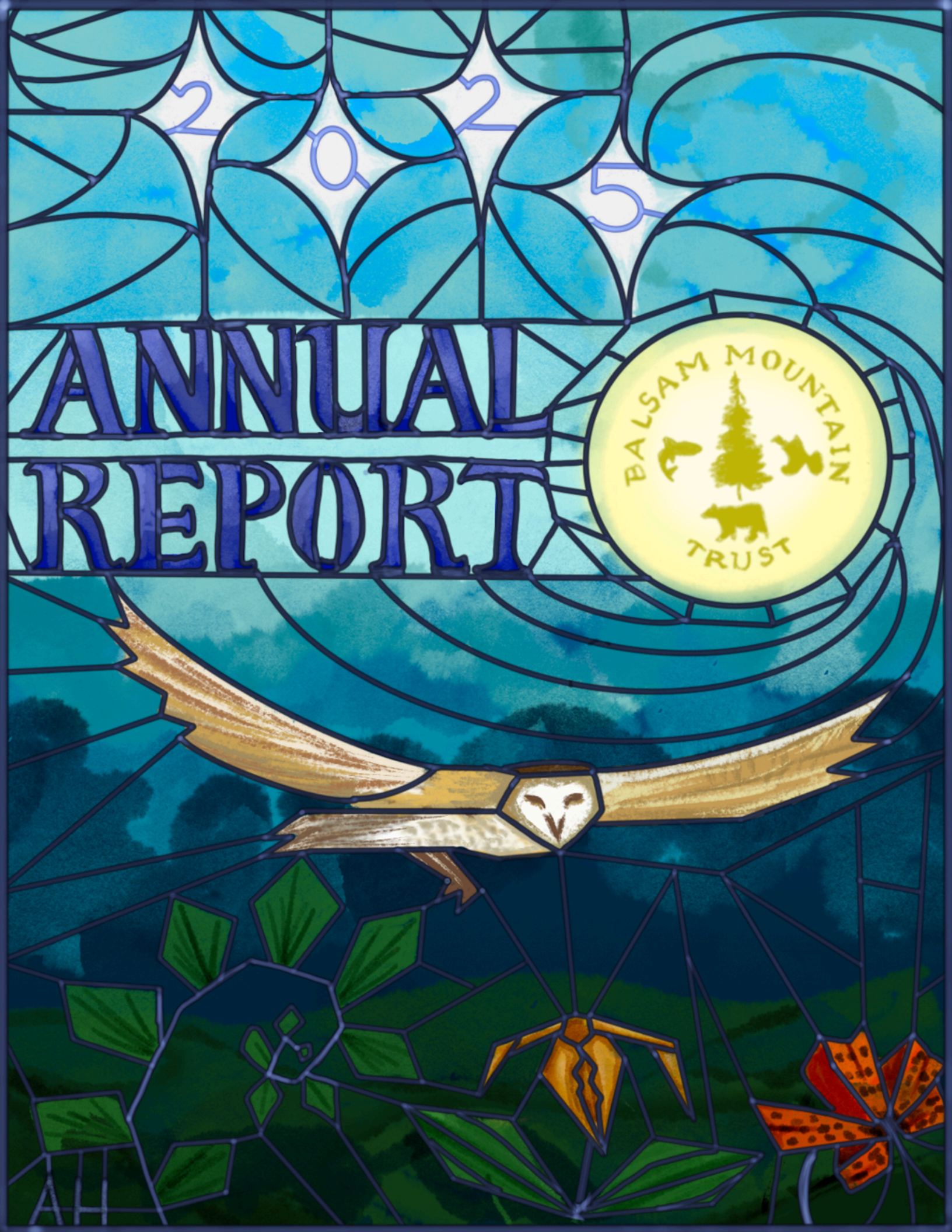

2025
ANNUAL REPORT
BALSAM MOUNTAIN TRUST
AH

Dear Friends of Balsam Mountain Trust,

For more than two decades, this community has been rooted in a simple conviction — that the wild beauty of the southern Blue Ridge — its ridgelines, its rivers, its rare and quiet places — is worth understanding and worth protecting. That conviction has never wavered, even as the people who carry Balsam Mountain Trust forward inevitably change.

This year, we find ourselves in one of those moments of change. As many of you know, we are engaged in a search for our next Executive Director. Transitions like this can invite uncertainty, but please know that the Trust's search is being approached with intention, not anxiety. Our board has spent this season understanding our history, rededicating ourselves to a shared vision, strengthening governance, and ensuring that whoever steps into this role inherits an organization built on a firm foundation.

What hasn't changed is the work itself. Our education programs continue to introduce the next generation to the treasures of the Blue Ridge mountains. Land stewardship — the responsible care of natural resources that protects ecological health for future generations — continues, acre by acre. Conservation research continues to deepen what we know about this remarkable ecosystem, and our conservation leadership outside the Preserve continues to advocate for its future. None of that work has paused for a single day — because none of it depends on any one person. It depends on all of us: staff, board, and — critically — you.

Supporters like you are not bystanders to this transition; you are the reason the Trust has the stability to navigate it well. Your continued support tells us, and tells our future Executive Director, that this mission is bigger than any one person and bigger than any one chapter in its history.

I think about what we ask of this land, and what this land asks of us in return: attention, patience, and care that spans generations, not just tenures. A century from now, the Preserve will remain the same healthy place. The vision of a beautiful, flourishing forest will guide the future. The generosity that fuels resiliency and commitment will make this dream a reality. Your impact and investment in the Balsam Mountain Preserve is timeless.

Thank you for being with us — in this season, in those before it, and in those still to come.

With gratitude,

Mary

Mary Edmondson
Board Chair, Balsam Mountain Trust

Dear Friends of the Trust,

We are so pleased to look back on a season of success and transition. With your help and your partnership, we are building a movement with the future in mind. Our work requires many voices and your voice matters! Together we are shaping mindsets. As I've listened to your conversations I have witnessed your passion. You care deeply about the Preserve and the people of Western North Carolina. You are each serving as ambassadors alongside our team at Balsam Mountain Trust and we appreciate the many ways you support our growing work.

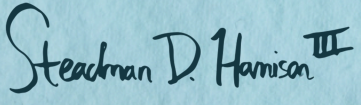
Balsam Mountain Trust is powered by a strong and talented team. Your financial generosity directly supports the contributions made by each of these team members. Rachael Hart serves as our Wildlife Coordinator and is known by our residents and neighbors for her outstanding care. She demonstrates her love for animals and her desire to see the next generation engage with the world of nature all around them. We frequently hear from teachers and students in our community how Rachael brings nature to life.

You likely remember a Trust Talk or hike with Amy Duggins, our Community Science Coordinator. She is an amazing storyteller and filled with curiosity. Amy leads with hospitality and extends an ongoing invitation to our science community to join us here in this living laboratory at Balsam Mountain Preserve.

If you have visited the Nature Center or connected with our team at a community event, you know Kim Jacobs, the Administrator for the Trust. Kim manages the complexity of this movement with professionalism and efficiency, and holds us accountable to the high standards valued here at the Preserve.

Our core team is multiplied and amplified by the expertise of AmeriCorps, an ongoing connection that we are pleased to host again in the year ahead. Ally Horn has served as our 2025/2026 AmeriCorps Member and reflected at her farewell party how much this experience has shaped and formed her appreciation and love for nature and culture. This Annual Report of the Balsam Mountain Trust is dedicated as a special thanks to our staff and extended team that make the good outcomes of the Trust possible.

And thank you for joining us as donors and volunteers and for your commitment to the stewardship of the natural and cultural resources surrounding us here at Balsam Mountain. Together we are shaping the understanding of the next generation and impacting the community by cultivating a culture of conservation.



Steadman Harrison
Interim Executive Director

Key Donors

Everything we do is thanks to you! Our work in conservation, community, and education is due to this amazing community of support. This comes in all forms, from volunteerism and cash donations that support our daily needs, to gifts of incredible art and unique items for our charity auctions.

Eagle Supporters $10,000+

Anonymous, Barry & Sally Halevy/Rauch Family Foundation, Beckie Yon and Mary Jayne Parker, Dan & Jackie Devine/Devine Family Foundation, Don & Mary Edmondson, Doug & Teresa Franklin, Gary & Meg Moskovitz, Jay & Melisa Crotts/Deloitte Consulting LLP, Michael & Patricia Dilick, Rowdy & Donna Lemoine, Sabrina Watkins & Jim Watson

Bear Supporters $5,000-$9,999

Bruce & Barbara Perry, David & Desiree Southworth/Southworth Development, Douglas & Dorene Harrison, Douglas & Lynn Smith/Smith Westmoreland Family Fund, Edward & Linda James, Jo Ridge Kelley, Joel & Kristen Bradley, Laura & David Howard, Mark Gress & Margaret McCarthy, Robert Howard & Marianne Lyon/National Philanthropic Trust, Shawn & Susan Harrison, Spring & Ron Rosen

Bobcat Supporters $2,500-$4,999

Andrew & Karen Manidis, Brian & Rene Noonan, Bruce & Christine Spencer, David & Nancy Linsky, David and Beth Looney, Hal & Kate Reed, Jay & Ginny Taylor, Jim & Janie Stratigos, John & Karen Sicner, John & Suzanne Morse, Ken & Bobbye Bowdon, Michael & Beverly Neal, Michael & Martha Summerford, Morgan-Keefe Builders, Inc., Paul Arsenault, Paul Jenkins, Richard & Kimberly Zimlich, Richard & Yolanda Knowlton/Knowlton Family Fund, Scott & Monica Morrell, Shick Construction LLC, Steve & Nancy Ison, Todd & Sherri Elder, Walton Reeves & Catharine Enright

Whitetail Supporters $1,500-$2,499

Abbvie, Bill & Jeanne Campbell, Brian & Viola Battin, Chip & Cindy Schuppert, Christian & Kim Oliver, David Kitchens, David Tozlosky, Jay & Elizabeth Monge, Jeff & Patty Marvel, John & Carol Landers, Kevin & Kristen Harney/Harney Family Charitable Fund, Patti Petersen, Paul & Debbie Lambert, Richard & Shellee Starr, Robert & Andi Colton, Samuel & Julie Belfore, Stephanie & Walker Upshaw

Trout Supporters $500-$1,499

Amelia Rosen, Barbara Huse, Barry Anders (Custom Paving), Bill & Carla Berry, Bill Mamrack, Dave & Tracy McCalpin, David & Kathy Herring, Denny & Cyndy Hanson, Douglas Carroll & Karen Jevsevar, Edward & Edye Haddock/Edward E. Haddock Jr. Family Foundation, High Country Furniture, Imperial Security & Wiring, Jackson County, James & Lisa Berger, Jason & Sherry Kwintner, JD Sullivan, John & Martha Hill/ Hill Family Charitable Fund, John & Morgan Fields (Haywood Landscapes, Inc), John & Mary Laura Philpott, Ken & Sharon Torok, Larry & Mary Arbaugh, Mark & Debra Vagasky, Marshall & Mary Bassett, Michael & Lynn Murphy, Mike & Kathy Nervie, Mike Resner & Kim Hendren, Nate Webster (ARCA Design), Neal & Deb Slafsky, Paul & Nancy Anderson, Perry & Julie White, Platt Architecture P.A., Pro Shop - Preserve, Richard Brobst & Karen Thomas, Robert Farquharson & Jan Kohl, Robert Moore & Silvana Rinaldi, Roy & Cynthia Gallinger, Stephen & Gale Barnett, Steve & Joanne Feiner, Steve Saieed, Tom and Lynn Pokorny

Monarch Supporters Up To $499

Alex Matzkin, Barry & Linda Fox, Danny Anderson, David Rosenthal, Dayna Walton, Doreen Kosciusko, Eric and Sherri Krueger, Erin White, Floyd Wilson, Gary Rutledge, James & Christina Kowalishin, Jen Toledo, Jon & Amy Hughes, Mark & Lauren Sembler, Mark and Julie Evans, Michael & Allison Wall, Molly Soderberg Schultz, Nick Weger, Owens Surveying, Penelope Cronin, Robert & Kimberly Williams, Sally Troup, Spriggley's Beescaping, Susan Bennett, Thomas & Allison Turbeville, Word Property Management



Dream Team
Staff Spotlights



Administrative Coordinator

Kim Jacobs

Balsam Mountain Trust is powered by a strong and talented team. If you have visited the Nature Center or connected with our team at a community event, you know Kim Jacobs, our Trust Administrator. Kim manages the complexity of this movement with professionalism and efficiency, and holds us accountable to the high standards valued here at the Preserve. Her hand touches nearly everything we do — from the events that bring our community together to the daily details that keep the Trust running smoothly. It's my pleasure to introduce her here, and to let her share what a year in her role looks like.

– Steadman Harrison, Interim Executive Director

When 125 guests gathered under the big tent on October 3rd to celebrate the Trust's 25th anniversary at Firefly Fete, they enjoyed a catered dinner, live and silent auctions, and dancing — a night made possible, in part, by months of work from Trust Administrator Kim Jacobs. She collaborated with generous volunteers to create a night to remember.

From July through October, Kim coordinated community sponsors, purchased decorations and supplies, managed ticket sales and auction items, greeted guests at the event, and then spent the following months making sure each donor received a personal thank-you and documentation of their gift. The result: one of the Trust's most successful fundraising events to date, generating substantial support from Preserve residents for conservation in our little corner of Western North Carolina.

Kim's dedication reaches far beyond one night a year. Each day Kim is at the Trust, she ensures that everything is moving forward for the entire team. Kim coordinates administrative duties for the Trust, including Trust Talks, newsletters, and meeting agendas, not to mention the behind the scenes work of keeping the Nature Center and all the staff in it prepared for a great day.

When visitors stop by the Nature Center, Kim is usually the first person they meet — greeting them with a smile and introducing them to our animal ambassadors. She shares the vision of the important work we do in the community, both internally and externally, with passion and kindness that builds a trusting relationship with guests and our community. Kim is the glue of our Nature Center and keeps us moving in a positive and meaningful direction day after day.





Community Building Coordinator

Ally Horn

At the tail end of 2025, the Trust welcomed Ally Horn as our AmeriCorps Member and Community Building Coordinator. Bringing a Bachelor's in Biology and a diverse background in wildlife research from stewardship in Washington to mammal trapping in Georgia, Ally is significantly expanding our educational outreach through innovative new programs.

A primary focus of Ally's work is our Pre-K and elementary school initiatives. She travels throughout the community with our animal ambassadors, giving local students a front-row seat to the wonders of nature and the importance of conservation leadership. These visits provide critical "gateways" for children to experience the wildlife of the Southern Blue Ridge firsthand.

Beyond the classroom, Ally is spearheading two new public programs that utilize her background as an artist to create "fun and creative learning environments" for the community. Whether through hands-on nature crafts or school-based programming, her role as an AmeriCorps member is central to the Trust's mission of inspiring the next generation of environmental stewards.



Wildlife Coordinator

Rachael Hart

From medical capture and restraint of our powerful red-tailed hawk to hands and knees crawling to clean up after a rogue possum poo, Rachael, our Wildlife Coordinator, gives the type of care to our animal ambassadors that would shame any 5-star spa and resort.

In 2025, Rachael managed an entire design and remodel of our new bird of prey enclosures, while also managing the well-being of said birds of prey while they were moved to temporary digs. She conducts all animal assessments and dozens of vet appointments for 17 animal ambassadors alongside our long-time veterinarian, Dr. Ross. She has formed relationships with several local wildlife rehabilitators and is a resource for both residents and the public for coexisting with wildlife.

Rachael provides the training to staff and animal-care volunteers to properly care for each animal ambassador. She safely and comfortably leads programs where both the human and the animal ambassador can enjoy the experience. She manages a dedicated volunteer team of 9, affirming a high level of care while also ensuring that the volunteers themselves are enjoying the commitment and experiencing joy.

This year, Rachael and the animal ambassadors were also one of the keynote speakers for over four 60-plus attended public events and summits at Haywood Community College and other local venues. One such event was at the North Carolina Arboretum with a special program on Trolls, where our "Troll-Like" animal ambassadors, Miss Toad and Albus the opossum, met with EcoEXPLORE students!

A wildlife coordinator wears many hats, but the welfare of our animal ambassadors and their time with us is at the core.

Rachael's heart and soul belong to each of our animal ambassadors and in getting others to share in that love and admiration with every opportunity she can get.





Community Science Coordinator

Amy Duggins

If you're out on one of our Balsam trails and hear a rustle in the woods, look closely – it might just be our Community Science Coordinator, Amy Duggins. Amy joined the Trust in 2023 after many years working as a park ranger, naturalist, field biologist, and environmental educator. At the Trust, her job is to help take excellent care of the Preserve's 3400-acre conservation easement, facilitate scientific research on the Preserve, and help both BMP residents and the wider community make a personal connection with this magical land we call home.





To take good care of the land, you have to get to know it well, and Amy likes to think of the forests and streams of BMP as her “second office.” Every month of the year, you can find her standing in the middle of our creeks testing them for stream health and water quality, often accompanied by curious and enthusiastic Preserve residents. 2025 also saw the inauguration of our new Frog and Toad monitoring program, as well as annual Breeding Bird surveys, rare plant monitoring, and invasive species mitigation.

Getting people out in the woods and connected to the land is something Amy feels passionate about. Here on the Preserve, you might find her leading folks through the dark forest at night to experience the enchantment of Blue Ghost fireflies, or on a walk in early spring to meet the first wildflowers peeking from the forest floor. In 2025 Preserve residents also joined her in citizen science projects such as Bird Counts and conservation projects like pulling invasive Multiflora Rose. Out in the wider community, Amy leads the Sylva Naturalist Club, a monthly nature-themed book and outing club at the public library, as well as leading hikes at Pinnacle Park.

Facilitating scientific research out in the Preserve’s amazing “natural laboratory” involves working with local university students and professors as well as other scientists who come here to learn about the Southern Appalachians’ unique biosphere. Each summer, Amy has the pleasure of working closely with two college students who are honing their skills in the conservation field. In 2025 our summer Research and Conservation Intern, who serves as Amy’s field partner in our summer conservation work, was WCU biology major Jessie Casteel; and the recipient of our annual BMT Undergraduate Research Award was UNC-Asheville environmental science major Carson Connors, who performed a field camera study on mammal activity patterns on the Preserve. These young people not only share their knowledge and talents with the BMP community, but also gain valuable experience as they go on to shape the future of conservation in our region.

Conservation, education, and research are three pillars that are central to the Trust’s mission, and Amy loves getting to work with all three of these aspects in her job with our amazing human and more-than-human community. So next time you hear a rustle out in the woods… please stop and say hello!





Trust Talks

Connecting Community to Nature

The 2025 Trust Talk series transformed the Preserve into a vibrant intellectual hub, bridging the gap between rigorous scientific study and community curiosity. The year kicked off in January with Amy Duggins' "Stories from the Field," which provided an intimate look at the day-to-day conservation work that defines our mission. This was followed by an analysis of the "Streams of the Preserve" by Michael Wall, a deep dive into the water quality and beauty of Preserve water resources. Both talks were a reminder of the joy and responsibility of living in such a special place.

The spring and summer sessions brought a diverse array of scholars to the Trust. Dr. Aimee Rockhill's "Bestiary of the Bushes" gave us the inside scoop on wildlife use of our local rhododendron stands. Dr. Philip Prince told us all about the mechanics of landslides in the Southern Appalachians, particularly in the context of Hurricane Helene. Even the dog lovers were satisfied by a deep dive into regional history with Bob Plott's session on the legendary Plott Hounds of North Carolina.

Beyond the lecture hall, the Trust curated immersive field experiences that turned nature into a living classroom. Community members, yet again, witnessed the glory of synchronized fireflies in the Smokies, and many joined Amy and Kathy & Mike Nervie for a stunning Super Moon Owl Night and Soup Supper, celebrating the Preserve's nocturnal residents under the brilliance of a full moon. As always, the Trust thanks you for attending and also for being such good stewards of our beautiful little corner of the Appalachians. Please let us know if you have any suggestions for Trust Talk presenters in the future.

WNC Birdfest 2025 Reaches New Heights







The 8th annual WNC BirdFest took flight on May 10, 2025, transforming Monteith Farmstead & Community Park into a vibrant hub of conservation and community. This year's theme, "Shared Spaces: Building Bird-Friendly Cities & Communities," resonated deeply with our supporters, emphasizing the vital connection between our local habitats and the migratory paths that span continents.

A Growing Flock ~ The energy at this year's festival was palpable, reflected in a 25% increase in attendance over the previous year. Approximately 400 attendees, including volunteers and vendors, gathered in Dillsboro to celebrate our feathered friends. While nearly half of our guests joined us from within Jackson County, BirdFest has truly become a regional destination; we welcomed visitors from 12 different states and across Western North Carolina, proving that our passion for nature knows no borders.

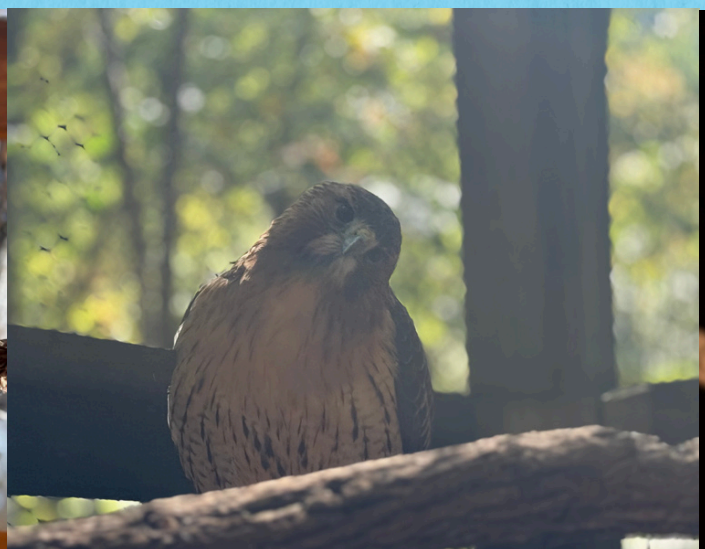
Education and Engagement ~ From the quiet focus of morning bird walks to the lively atmosphere of the Bird Trivia After-Party at Innovation Station, the weekend offered something for everyone. Families engaged with live bird ambassadors and interactive crafts, while seasoned birders explored the Farmstead's natural areas during guided plant and bird walks.

Our commitment to science and conservation was front and center. Attendees connected directly with local organizations working to protect regional biodiversity, gaining practical tools to make their own backyards more "bird-friendly."

Community and Culture ~ BirdFest is as much a celebration of people as it is of birds. The air was filled with live music and the spirit of collaboration. Local artisans and vendors reported successful sales, showcasing a unique collection of works inspired by the natural beauty of the region. This intersection of art, local economy, and ecology is what makes BirdFest a cornerstone of our programming.

Collaboration is the Core ~ Successes like BirdFest are made possible through the strength of our partnerships. We extend our sincere gratitude to AmeriCorps, Mainspring Conservation Trust, Wild Remembering, and the Highlands-Cashiers Land Trust. Special thanks also go to our sponsors, the Jackson County Tourism and Development Authority and Vortex Optics, for their investment in our community's natural heritage. We remain inspired by the joyful, welcoming spirit displayed by our "flock." Thank you for standing with us to ensure that our shared spaces remain a sanctuary for both birds and people.







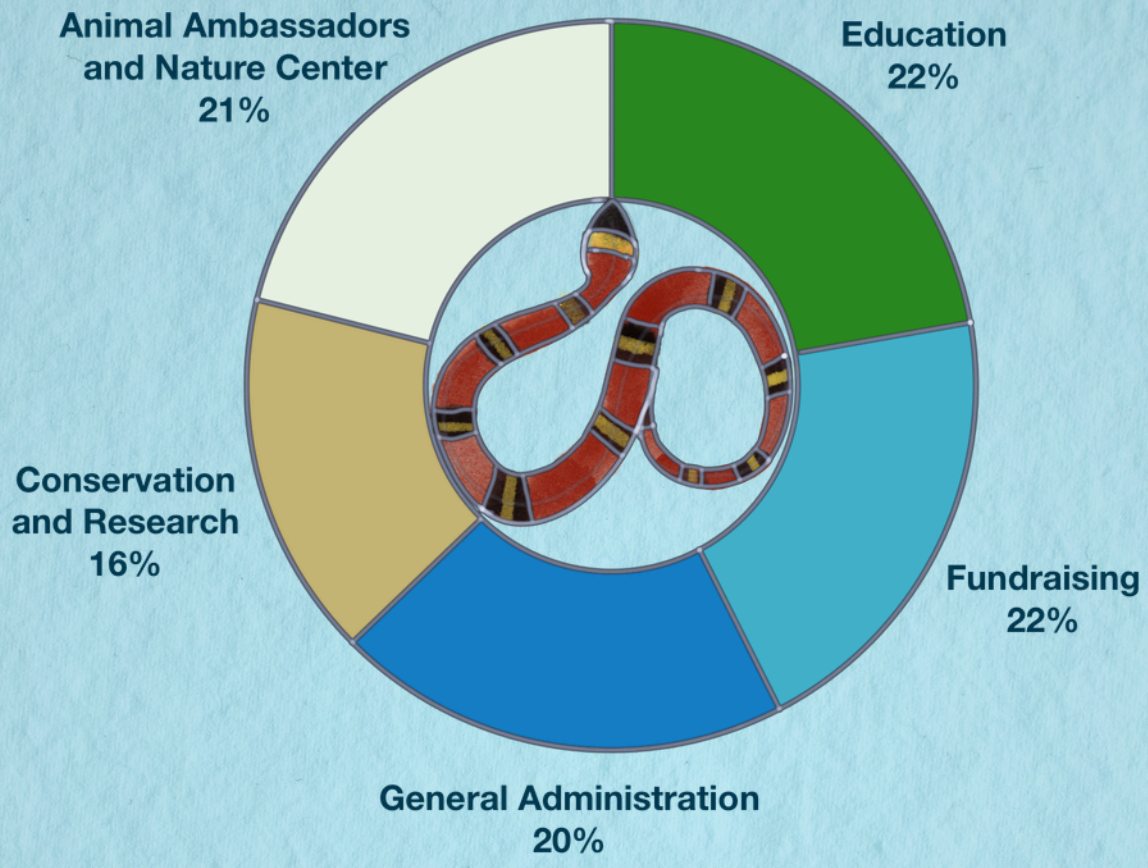


Mew Rebuild

In 2025, the Trust reached a major milestone in avian care with the completion of the new raptor mews, specifically designed for our resident ambassadors, Apollo (Harris Hawk) and Luna (Barn Owl). This project was born from a deep commitment to the safety and quality of life of our ambassadors, providing them with a more spacious environment while enhancing the visibility and visitor experience for Nature Center guests.

This vision would not have been possible without the commitment of Rowdy and Donna Lemoine to rally the community's support around the project. We owe a special debt of gratitude to Rachael Hart, whose tireless oversight and hands-on contributions ensured every detail was met with professional excellence. These new mews represent a significant leap forward in the quality and aesthetic of the Nature Center experience and are representative of more great things to come.

2025 Expenses By Functional Area



Revenues

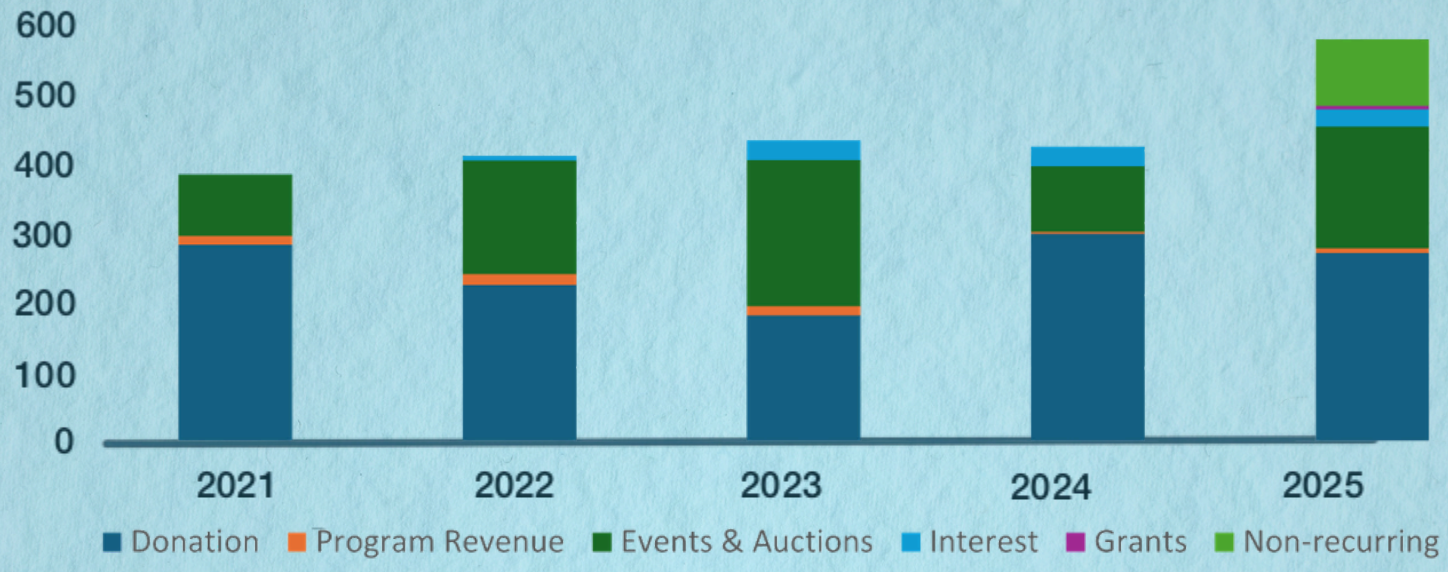
Donations	$259K	45%
Program Revenue	$6K	1%
Events and Auctions	$165K	29%
Grants	$26K	5%
Interest	$23K	4%
Non-Recurring Revenue	$92K	16%

Expenses

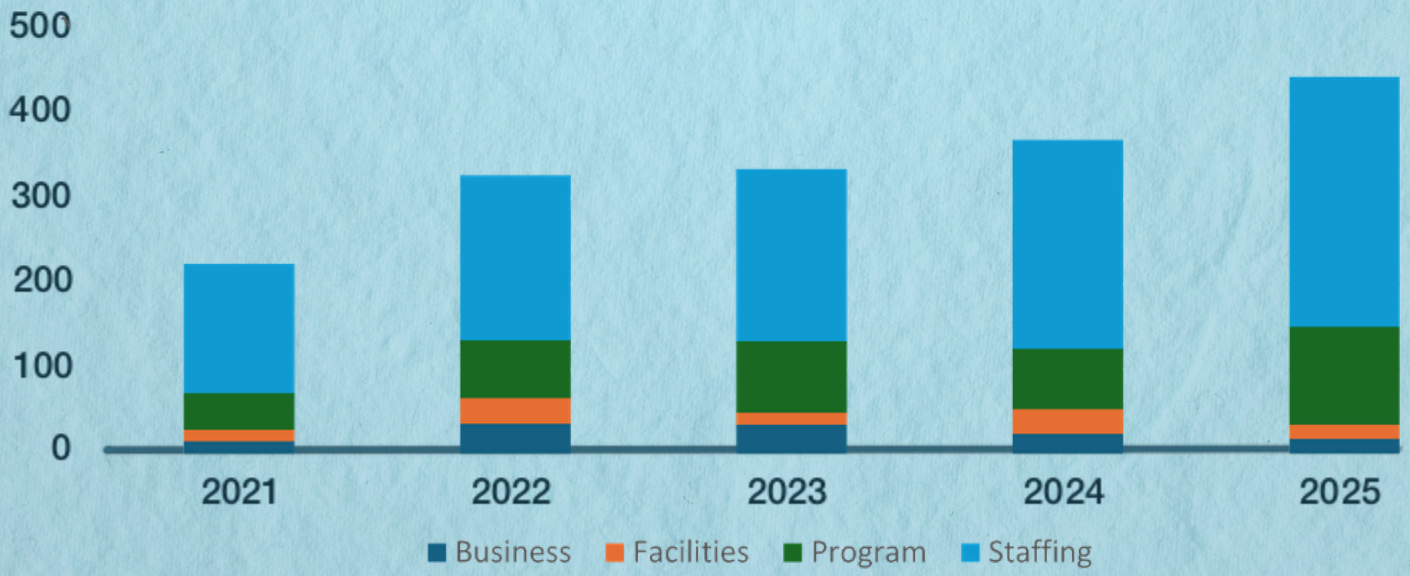
Buisness Operations	$18K	4%
Nature Center Maintenance	$17K	4%
Land Stewardship	$11K	2%
Animal Ambassadors	$17K	4%
AmeriCorps	$8K	2%
Preserve Programs	$4K	1%
Party Expenses	$70K	16%
General Fundraising	$5K	1%
Staffing	$294K	66%

Historical Financial Summary

Revenues



Expenses





Staff and Board

2025 Trust Staff

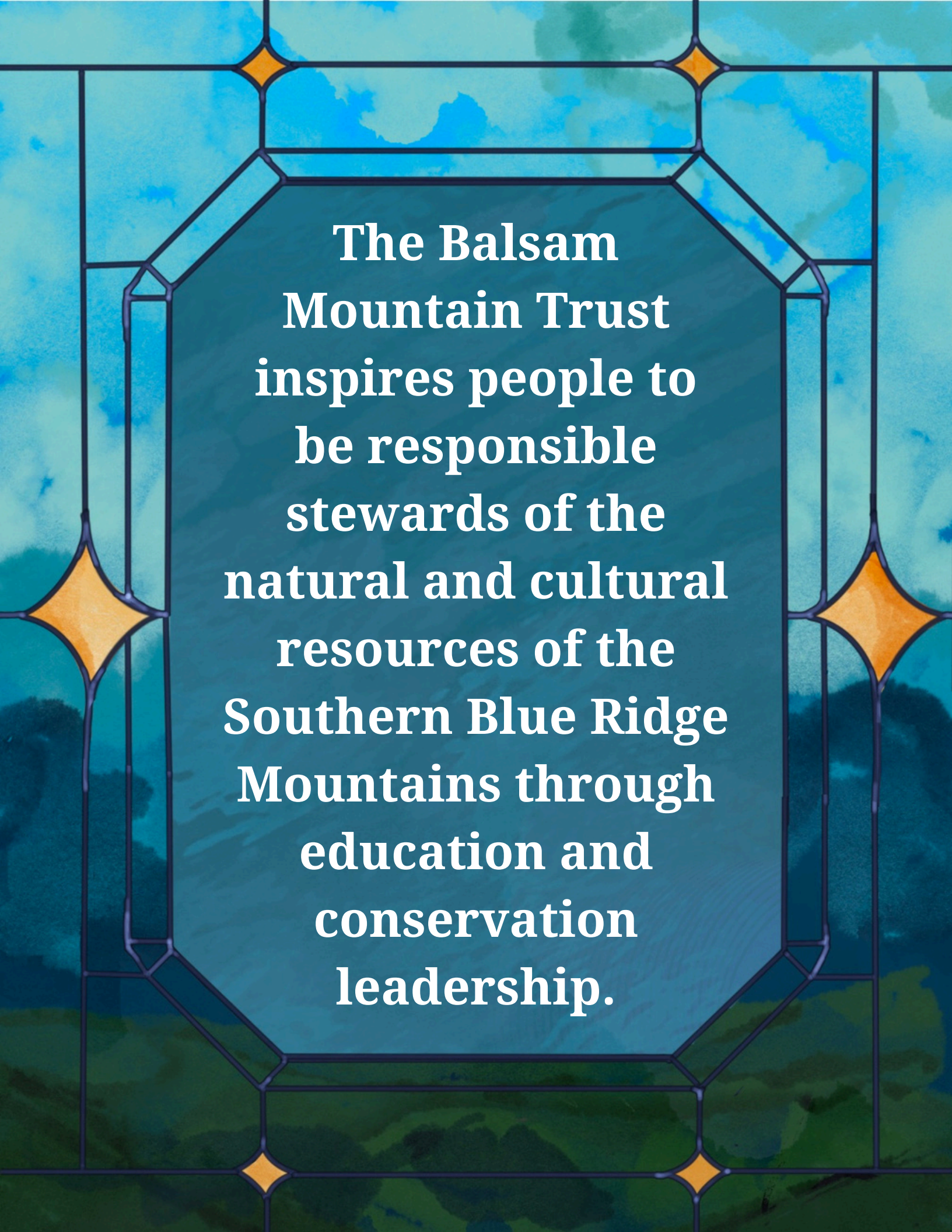
Amy Duggins, Community Science Coordinator
Rachael Hart, Wildlife Coordinator
Ally Horn, Community Building Coordinator / AmeriCorps Member
Kim Jacobs, Administrative Coordinator
Michael Wall, Executive Director

2025 Board of Trustees

Mary Edmondson, Board Chair
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Sally Halevy
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Cover Art by Ally Horn


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.