



# 2020 Annual Report

## **2020: An Indescribable Year of Firsts.... and NATURE IS OPEN!**

**Balsam Mountain Trust launched into the Roaring 2020's with a lineup of FIRSTS. We had to close the Nature Center due to the pandemic. But our BMT team rose to the challenge and magnificently expanded the outdoor exhibits and signage.**

**We did our first virtual school programming appreciated by over 3000+ students and teachers. Live animal programming mattered, and even the quiet kids asked questions in the chat. Virtual Bird Fest touched 1500+ people and we did full summer programs for 2 library systems.**

**And, oh the 20<sup>th</sup> Anniversary Trust party!! May the Forest Be with You! It was our first (hopefully last J) semi-virtual pod party – we had over 100 participants from 8+ locations – it was good to “be together” – thanks to the truly amazing work by Kathy, Chip and the team.**

**As so many things were closed, we were reminded that NATURE IS OPEN!! We had record participation in “pod” hikes, discovery packs, scavenger hunts and so much more. We got adventurous with iNaturalist and AllTrails.**

**In a year that was disastrous for many non-profits, thanks to our incredible donors, we endured. Our team overcame profoundly new situations –students navigated changing school options, parents faced working and schooling from home, and more. WE FOCUSED ON DELIVERING THE MISSION. You can be incredibly proud of how the Board, Trust Staff and volunteers continued to deliver education, research, and conservation frugally and creatively during a truly challenging year.**

**Our outdoor time reminded us of the joys of being in nature and of its fragility. We learned about “forest bathing” to restore serenity when life is crazy. We noticed the beautiful spring ephemeral wildflowers, but we noticed the invasives, too. Our board, property owners, and naturalists became even more aware of the importance of protecting this extraordinary place. NATURE IS OPEN, and we appreciate her even more.**

**Sabrina Watkins  
Trust Board Chair**



**What an amazing year in the life of the Trust was 2020. It almost defies words but I will attempt to articulate something to state that, regardless of the challenges we faced, we were still able to carry on courageously and successfully. And to that thought, we were also able to realize tremendous success with our fundraising efforts for the year. I believe that folks saw the Trust as a stalwart organization that, in spite of the challenges that were thrown our way, we managed to prevail—to the degree achievable—in continuing to meet our mission.**

**And while we had to cancel our program presentations to live, in-person audiences we were still able to offer our messages to a whole of bunch very patient and curious audiences by way of virtual classrooms. We were indeed fortunate that the education team of Rose, Jen and Nicole persevered, with a high rate of success I might add, in presenting the quality of programming our clients have come to expect. Nicole especially carried the Trust banner high with here many virtual conservation education programs.**

**2020 also required us to get creative with our annual Trust Party. Kathy Nervie and her team, along with Trust staff were able to craft a creative, fun and successful event that featured both live, in-person participation as well as attendees participating from their respective 'pods' in different places both on and off the Preserve.**

**Michael Skinner  
Executive Director**

## 2020 Financial Statement

### Operating Revenue

Contributions: individuals, businesses, foundations	\$ 205,572
Events, auctions, ticket sales, Gifts-in-Kind	\$ 26,438
Program Revenue	\$ 13,174
Other, e.g., grants, interest, etc.	\$ 8,243

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**Total Operating Revenue** \$ 253,426

### Operating Expenses by Program

Education	\$ 87,840
Fundraising	\$ 18,990
General & Administrative	\$ 73,918
Nature Center (includes remodel)	\$ 39,975
Resource Stewardship	\$ 2,025

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**Total Operating Expenses** \$ 222,568

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**Net Income (Loss)** \$ 30,858

## 2020 Annual Ask Donors

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*

### ***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)***

*Sheri & Eric Krueger, Bill & DonnaJean Mamrack, Jan Kohl & Bob Farquharson, Martha & Michael Summerford, Teresa & Dave May, Linsky/Levinson families, Mary & Don Edmondson, Suzanne & John Morse*

### ***Whitetail Deer Club***

***(\$1,500—\$2,499)***

*Catherine Enright & Walton Reeves, Karen & Andrew Manidis, Cassandra & Rick Watson, Teresa & Doug Franklin, Janie & Jim Stratigos, Anee & Jim Kistler, Mary and Marshall Bassett, Kimberly & Rick Zimlich*

***Brook Trout Club***

***(\$500—\$1,499)***

***Louise & Dave Sparks, Barbara Perry, Mary & Larry Arbaugh, Linda Outlaw & David Kitchens, Elizabeth & Jay Monge, Karen & Bob Hannan, Beth Sorrentino & Michael Skinner, Shellee & Richard Starr, Sharon & Ken Torok, Debra & Mark Yagasky, Pam & Mike Frey, Susan & Shawn Harrison, Kay & Robert Abney, Lou & Thomas Grady, Tesa & Jon Oechsle, Sandy & Nathan Leder, Nancy & Lawton Hayes, Nancy & Steve Ison, Mike Dennis***

***Monarch Butterfly Club***

***(up to \$499)***

***Sandy & Keith Montgomery, Cathy & Buddy Winkle, Gale & Stephen Barnett, Connie & Bobby Croswell, Lucy Hart, Lisa & Chris Anderson, Cynthia Hanson, Lynn and Thom Pokorny, Barry Fox, Lucy Hart,***

***Trust Auction Winners***

***Dianne & Richard Dunn, Joe Dellinger, Mary & Bill Staton, Susan & Shawn Harrison, Jayne Parker & Beckie Yon, Mirtha Casimir, Kathy & Michael Nervie, Janie & Jim Stratigos, Mary & Bill Staton, DeBacco Family, Donna & Roudy LeMoine, Linda & Ed James, Cynthia & Chip Schuppert, Beth Sorrentino & Michael Skinner, Mary & Larry Arbaugh, Shellee & Richard Starr, Sabrina Watkins & Jim Watson, Teresa & Dave May, Thomas Turbeville, Sheri & Dave Straw, Nancy & Steve Ison, Gale & Stephen Barnett, Carol & John Landers, Karen & Andrew Manidis, Jan Kohl & Bob Farquharson, Mirtha Casimir***

***Business Sponsors***

***John Burgin Construction, High Country Furniture, Morgan-Keefe Builders, John Landers, Shick Construction, Haywood Landscapes, Andrew Manidis, Countryside Animal Clinic, Motion Makers Bicycle Shop, Imperial Security & Wiring***

***“Service to others is the rent you pay for your room here on earth.”***

***—Mohammed Ali***

***“If there be any truer measure of a man than by what he does, it must be by what he gives.”***

***—Robert South***

2020

## Measures of Success in 2020

The Trust staff is guided by the direction set by the Board of Trustees. In 2020 we accomplished:

- 1) Nature Center remained open as much as possible during Covid-19 induced lock-down
- 2) Interesting, well attended and complimented series of its annual Trust Talk lectures which included two Artist-in-Residence sponsorships. Both artists donated a piece 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 limited 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 were initiated by Western Carolina University professors.
- 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 was scaled back but was still successful with both live and virtual participation. THANK YOU BMP members, sponsors, volunteers and Preserve staff!
- 9) Successful maintenance and health of the Trust's animal ambassadors.
- 10) Trust Talks, as with most programs in 2020, were presented virtually.

*“There is a pleasure in the pathless woods,  
There is a rapture on the lonely shore,  
There is society, where none intrudes,  
By the deep sea, and music in its roar:  
I love not man the less, but Nature more”*

*— Lord Byron*

### Balsam Mountain Trust

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Sylva, NC 28779  
(828) 631-1060  
www.balsamountrust.org

#### Trust Staff

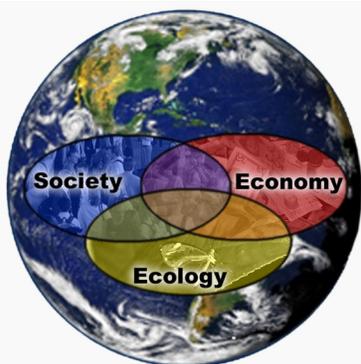
Michael Skinner  
Executive Director

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

Eliza Hurst, Nicole Cook  
AmeriCorps Service Mem-  
bers

#### Board of Trustees –2020

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



### 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 and their guests, schools and the general public. We are happy to report that in its twenty-year existence, the Trust has reached 105,000 people! Given the Covid-19 pandemic, we found ourselves, like so many other educators, in new and challenging territory in 2020. Our team quickly pivoted to find ways to reach all of the groups we serve through virtual, distanced and self-guided programming while still managing to reach over 4,000 people. Our staff also deepened its knowledge through taking a Nonprofit Management Course offered through the NC Center for Nonprofits.



NC 2.0: For most of 2020 the indoor exhibits to the nature center were closed, but many of our exhibits and animals are outdoors and were open for residents to visit any time! It is noteworthy to mention that we had 250 residents and guests visit in Q1 before we shut down – a higher number than usual for the first quarter. We continued work to make the vision for the nature center come to life, adding our brick donor pathway, two raised garden beds, and an exhibit on moonshine - complete with a still found on BMP property. We also gave our animals home renovations, completing repairs and adding new perches for them to enjoy!



Member Outings: In 2020 we continued to offer hikes, garden club and animal encounters. We also developed socially-distanced family activities including the Ed-venture Trail at Dark Ridge Camp, a scavenger hunt at Sugarloaf Creek, and Discovery Backpacks filled with activities for families to enjoy together in nature. Trust Talks moved to a virtual format and continued to be a fan favorite. We plan to keep this virtual option so that folks can enjoy the talks from anywhere! For those not on the mountain, we initiated “Inbox Naturalist” a weekly nature digest, and continued training and updates on iNaturalist which now has 38 people that have submitted over 600 observations of flora and fauna on BMP property! Before the pandemic hit, we had some fun programs including a field trip to the Green Energy Park along with a glass blowing demo and an NC Apple Heritage Cooking Class. We look forward to being able to offer more in person programs like this in the future!



Greening up the Mountain: We hosted our third 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. 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 year we initiated an education

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campaign to help continue the success of the recycling program that started last year. And, good news for wildflowers: mowing recommendations were formally adopted by the CA and Balsam Wildflower plots were reseeded. Both of these programs aim to improve wildlife habitat and beauty along BMP roadsides.

**Public Outreach:** We are so grateful for our Balsam Mountain Preserve owners who stepped up to fully fund our 2020 Adopt-a-School (AAS) programs after we lost most of our small business sponsors (due to pandemic-related economic hardship). These programs reach 4<sup>th</sup> and 5<sup>th</sup> graders at 9 of our local Title 1 schools at no cost. Our AmeriCorps member quickly converted these programs to a live virtual format. We were thrilled to see how engaged students were! We also created supplemental materials for AAS and 1<sup>st</sup> and 2<sup>nd</sup> grade pollinator programs to reach students that did not have internet accessibility.

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 are so thankful for this program! Our students love it and they are engaged and learning about science! Thank you for working with us to provide your programming digitally!"

Hayley Donaldson, Clyde Elementary

"Being a Title I school means we have a large number of students who receive free/reduced school meals. For this reason, we are unable to ask for a lot of money for field trips. We truly appreciate our sponsor who makes educational opportunity possible for us."

Karen Hopkins, Bethel Elementary

"This was a wonderful addition to our study of animals, their habitats, and adaptations. It encourages my students to think more about their effect on the environment and the animals in their surroundings."

- Morag Miller, Fairview Elementary

Given the challenges of the pandemic, our public program reach was down only 30% from 2019. And the lessons learned in doing pre-recorded and live, virtual program formats were invaluable. Although we always prefer in-person programs, we now have a new tool kit to expand our offerings.

**AmeriCorps:** This is the sixth 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 un-



deserved groups throughout the region. Nicole Cook, our 2020 member, led the charge in pivoting our programming to various virtual formats including changing our Bird Fest to a weeklong Facebook Live event in collaboration with regional partners and reaching thousands of viewers. Nicole also played a lead role in securing funding (Duke Energy Foundation and Entomological Society of America) for the creation of pollinator education bins for 1<sup>st</sup> graders throughout the region. With funding in hand, we set to work creating the curriculum guide and hands-on activities. This will be the first science activity kit available for 1<sup>st</sup> graders in our state – Wow! In 2021, teachers will be able to check them out from us at no cost. We are thrilled that Nicole has decided to continue this great work by accepting a second AmeriCorps term with us in 2021.



## 2020—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 2020.

Program Type	Programs Offered	Total Attendance	Additional Notes
<u>Member Programs</u>	97	601	Despite the pandemic, we offered more programs than in 2019 but with approximately half the participants; Virtual and self guided were also offered, but not included in the numbers: scavenger hunts, iNaturalist, etc.
<u>Drop-in visits to the Nature Center</u>	75	250	Numbers mostly from Q1; down overall from 640 people in 2019, but generally trending up, with only 204 people in 2018 & 74 people in 2017
<u>Adopt-a-School</u> 4th – 5th grade	52	991	Offered at no cost to schools through sponsors
<u>Schools (other) and Public</u>	8	2279	If all virtual Bird Fest engagements included, this number goes to 4,321; pre-recorded videos shared to libraries; public participation down by ~30% from 2019

## **AmeriCorps 2020 (and part of 2021) in Review** **By Nicole Cook, AmeriCorps Service Member**

**This year has been full of unexpected challenges, opportunities, and successes. Despite being unable to provide in-person programming for the majority of the year, I was able to provide virtual and take-home materials for 1<sup>st</sup>, 2<sup>nd</sup>, 4<sup>th</sup>, and 5<sup>th</sup> grade students at local Title I schools and people of all ages through our local libraries.**

**I continued my work from my last AmeriCorps term, developing pre-recorded videos, providing live-virtual programs, and creating printable activity guides on topics ranging from vertebrate zoology to pollination.**

**One of my greatest successes during my term was distributing pilot pollinator education kits to local 1<sup>st</sup> grade teachers. The kits include activity guides chock full of helpful information, resources, and instructions and materials for 12 activities.**

**I was also able to coordinate this year's migratory bird festival which included live streams with our birds of prey, virtual content from 10 community partners, an in-person bird of prey presentation, and a birding hike on Preserve property! The level of engagement from folks in the western NC community was wonderful! I am thrilled to continue my work in the community with in-person programming! I will be bringing our live animal ambassadors to local**



**libraries, summer school programs,**

**REACH shelters, and more. As my time with BMT comes to a close, I'm very excited for my next chapter, graduate school at WCU! I plan to stay connected with the Trust and stop by as much as I can. I'm so thankful for everything I've learned from Rose, Jen, and Michael, the connections I've formed in the community, and for the opportunities I've had to get to know BMP folks. I will certainly miss seeing the people and animals at the Nature Center every day, but I will remain connected as much as I am able.**



