



2018 Annual Report



Balsam Mountain Trust

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Trust Staff

Michael Skinner
Executive Director

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

Bethany Sheffer, Eliza Hurst
AmeriCorps Service Mem-
bers

Board of Trustees –2018

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Jan Kohl, Treasurer
Sheri Straw, Secretary
Mary Arbaugh
Pete Bates, Ph. D.
Roy Gallinger, M.D.
Sabrina Watkins
Louise Sparks
Rob Colton, M. D.
Mary Arbaugh
Al Tunstall

Keep close to Nature's
heart... and break clear
away, once in awhile, and
climb a mountain or spend a
week in the woods. Wash
your spirit clean.

John Muir

2018—A Wonderful Year!

2018 turned out to be an exciting year of action and adventure for the Trust. Thanks to the efforts of our BMP Members, the Trust Board of Trustees, the Trust staff and its volunteers. This report highlights the accomplishments of this organization as well as some fun moments that were captured throughout the year. Please take a look at the report and let us know what you think. We encourage participation with the Trust and so we invite you to visit with us again in 2019; help us with our Nature Center home improvements; engage with Trust staff for an outdoor adventure and enjoy the wonders of our animal ambassadors.

Measures of Success in 2018

The Trust staff is guided by the direction set by the Board of Trustees. In 2018 we accomplished:

- 1) The completion of the Nature Center remodel; moving back into the building; the un-interrupted work of its mission. Exhibit construction continues into 2019.
- 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, Walk for Wildlife, animal ambassadors interaction.
- 4) Public education presentations to audiences in a five-county area in western North Carolina which continued to receive rave reviews from participants.
- 5) Research initiatives, which in 2018 realized the completion of the ramps study and the first half of predator camera-trap study (which will continue in 2019).
- 6) Hosting of the AmeriCorps Service program which facilitates the Trust reaching underserved in Jackson and Haywood Counties.
- 7) Partnering with local businesses to fund our Adopt-a-School and Monarch/Pollinator Initiatives.
- 8) An amazing turnout at the 'Back to the Future' Trust Birthday Party. Attendees enjoyed: fellowship, the band, food, a fun skit, decor, auction items and much more! Generous donors contributed over \$60,000 (a third of the Trusts operating expenses for the year) and set a new record for the event!
- 9) Successful maintenance and health of the Trust's animal ambassadors. (We did mourn the passing of our long-time faculty member, Rasta, the eastern screech owl.
- 10) Progress on the Strategic Plan.

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.

2018 Donors

The Balsam Mountain Trust would like to acknowledge and thank the donors listed who contributed to the Trust's success by contributing to its success.

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.

* denotes Trustee

We would like to especially thank our anonymous donor who continued to provide the \$25,000 challenge grant in 2018, as a means to encourage more donor participation with the Trust.

Eagle Club

(\$10,000 and above)

Jayne Parker & Beckie Yon
The Walt Disney Foundation
Jeanne & Charlie Harris
Anonymous

Black Bear Club

(\$5,000—\$9,999)

Marianne Lyon & Rob Howard,
Hal & Kate Reed Foundation,
Pangea P. Sampson II, LLC,
Tricia and Mike Dilick

Bobcat Club

(\$2,500—\$4,999)

*Jan Kohl & Robert Farquharson, Jackie & Bob Fitts, Pam & Mike Frey, Linda & Ed James, DonnaJean & Bill Mamrack, Suzanne & John Morse, *Janie & Jim Stratigos, *Sabrina Watkins & Jim Watson, *Sheri &

A Note From Your Board Chair and Executive Director

There's No Place Like Home...

...2018 was a monumental year for the Trust. After repurchasing the Nature Center in 2017, we endeavored to update and "spruce up" our old/new home. With the help of Shawn Leatherwood's The Architectural Studio, Rob Howard, the Board, staff and countless volunteers, the Trust was able to renovate the Nature Center and install new and exciting exhibits to educate and inspire our members.

In addition to all of the construction projects, our staff continued to provide outstanding environmental education programming to our members, students in Jackson and Haywood Counties and the community in general.

I encourage everyone to come by and see all of our progress in person!

Janie Stratigos
Chair, Board of Trustees

Editor's Note: The Trust would like to extend its deepest appreciation and gratitude for Janie Stratigos' long term of service with the Trust, which culminated in her term as Board Chair for the last two years. We also are indebted to the service of the Amazing Carol Landers and Mary Arbaugh, the Adaptable Thespian Al Tunstall, and Peter Bates (see article about Peter in this report), who rolled off at the end of 2018. Trustees serve as volunteers and we're extremely grateful for their service to this organization.

The Balsam Mountain Trust celebrated its eighteenth year of operation in 2018. And throughout its existence, the Trust staff and Board of Trustees have exemplified what it means to operate a nonprofit that is true to its mission and stewards its gifts from donors in a transparent and accountable way.

In 2018 the Trust continued to build on its reputation based upon the professionalism of its team, the programs offered and the positive response of participants. We pride ourselves on staying focused, being mission and audience relevant and creative in program development, themes and delivery. We are indeed fortunate to continue being warmly received, as part of the culture and fabric of BMP, but also by the broader audiences with whom we interact across western North Carolina.

2018 demonstrated that it's important to continue the success of our model with conservation education, interpretation and animal care while also evolving as economic, community and environmental conditions change and present new challenges and opportunities.

Michael Skinner
Executive Director

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: members, schools and the general public. We are happy to report that in its eighteen-year existence, the Trust has reached almost 100,000 people! Over 7,500 people participated in Trust programs in 2018.

Member Outings: In 2018, folks enjoyed hikes, feeding frenzies and summer camps for children. Trust Talks also continued to be a fan favorite! In an effort to create



Trust Naturalist Jen poses with some dedicated roadside wildflower recruits (BMP members). This program not only enhances the beauty (and as a result, the value) of the Preserve but also provides the wild pollinators with a place to fuel up while on the go.

a deeper sense of community, we offered Garden Club and reading and writing workshops as regularly scheduled group learning experiences. Many also participated in Walk for Wildlife, helping us to raise funds for local conservation yet again! The 2018 grant recipient was Montreat College, for a hellbender salamander study. The new addition of a native plant sale was also a big success.

The Balsam Wildflowers Project was started in 2016 in order to bring wildlife habitat as well as color and interest to our roadsides. This year we added more Claspings and Purple Coneflowers and Shasta and Ox-Eyed Daisies to already existing beds in order to increase plant diversity. Thanks to the homeowner volunteers that have helped

us to seed the nearly 2,800 sq. feet we have in place!

In order to bring more community action to sustainability on the mountain we formed a Green Team with representatives from the Trust, Community Association and Preserve. We've established key priorities, e.g., roadside mowing, recycling, etc., and are meeting regularly to make progress towards them.

Public Outreach: In 2018, we are grateful to have maintained our 4th and 5th grade Adopt-a-School program and 1st and 2nd grade monarch program, reaching 10 schools and more than 3,500 students at no cost to the schools—thanks to our business partners. 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.

"Having free educational opportunities is vital to enrichment in title 1 and underperforming schools with poverty! Thank you for the outreach and commitment to equitable education! "

Educator at Smoky Mountain Elementary

Bobcat Club, con't

(\$1,500—\$2,499)

Dave Straw, Martha & Mike Summerford, Mary & Bill Staton

Whitetail Deer Club

(\$1,500—\$2,499)

Catherine Enright & Walton Reeves, Mary & Marshall Bassett, Anne & Jim Kistler, Shellee & Richard Starr, Mary & Marshall Bassett, Linda Outlaw & David Kitchens, Holly & Greg Pollock

Brook Trout Club

(\$500—\$1,499)

*Mary & Larry Arbaugh, Julie & Sam Belfore, Julie & Mark Evans, Karen & Andrew Manidis, Elizabeth & Jay Monge, Nancy & Steve Neubeiser, Linda & Mac Purdy, Cindy & Chip Schuppert, Nancy & Wayne Seidensticker, Beth Sorrentino & Michael Skinner, Louise & Dave Sparks, Cindy & Al Tunstall, Kimberly & Rick Zimlich

Monarch Butterfly Club

(up to \$499)

Sharon & Paul DeBacco, Sheri & Eric Krueger, Lynn & Thomas Pokorny, Lisa & Chris Anderson, Nancy & Paul Anderson, Elektra & Mills Ariail, Gale & Stephen Barnett, Mary & Don Edmondson, Marcia & Murray Goldman, Sandy & Nathan Leder, Jo Marie & Robert Hebel,er,

And...Thank You to All the Auction Winners and Donors !

Buyers' Club:

Families: LeMoine, Tozlosky, Colton, Mamrack, Connell, Sparks, Fulbright, Bassett, Landers, Manidis, Stratigos, Kohl/Farquharson, Watson/Watkins, Outlaw/Kitchens, Arbaugh, James, Franklin, Tunstall, Starr, Dilick,

Outside of these flagship programs, we reduced our school and public program offerings by 50% to create exhibits and the move into our permanent home—NC 2.0.

As a part of our strategic plan, we developed an education committee, including local educators, school curriculum coordinators and environmental education experts.

We hosted two meetings with them in 2018 and are pleased with the mutually beneficial relationships that we've begun to foster.

AmeriCorps: This is the fourth 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 other underserved groups such as the local REACH shelter for abused women and children that we regularly visit.

Bethany Sheffer, our 2018 member, led the Trust in hosting our 2nd annual Migratory Bird Day Festival, welcoming three times the number of participants as in 2017! She also headed up community service events such as pollinator garden work days and trash clean-ups. Bethany finished her term in summer and we are excited to have ushered in our new service member and for-

AmeriCorps Service member Eliza Hurst, keeps a watchful on Blossom, the opossum, as she demonstrates the wonders of this amazing mammal to an enchanted group of students. Ahhh, the wonders of nature!

mer BMT animal care volunteer, Eliza Hurst.

Volunteers: We would like to give an enthusiastic thank you to our animal care volunteers!. In 2018 we had 12 volunteers contributing 650 hours at an estimated cost savings of over \$16,000 (Independent Sector estimate). We also 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!



Long-time volunteer Bret Ladrie, poses with ambassador Apollo (our Harris' hawk), bid the Trust adieu in 2018 to pursue a professional career working with wildlife. Bret was truly a champion for the Trust.

2018 Donor Listings, con't.

Auction Items Donors' Club:

Carylon Killebrew, Steve/Nancy Ison, Cindy Long-Schuppert, Sorrentino/Skinner, Bloodworth/Kohl/Farquharson, Colton/Barnett, Janie/Jim Stratigos, Krueger/Landers/Lemoine, Ken Bowdon, Mirtha Casimir, Travis Wilson, Lila Kilby, Paul Anderson, Stephen Barnett/Dave Straw

Party Sponsors:

Schick Construction, Platt Architects, Laura and Brian Philips, RazorFly Studios, Burgin Construction, Architectural Studio, BMP Sales Team, Sharon and Ken Torok, USB-John Landers, AMBA Products, Historical Concepts, Montgomery Construction, Vannoy Construction



2018—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, which we're confident we're doing.

What follows are the end-of-year totals for programs and attendance in 2018.

Program Type	Programs Offered	Total Attendance	Additional Notes
<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.)	137	948	Down from 1,023 in 2017 (425 from special events) 50% of hikes had zero participants (75% with zero in 2017)
<u>Drop in visits to the Nature Center</u> Members and guests drop in and we give them a tour of Nat. Ctr.	40	204	Up from 74 people in 2017
<u>Adopt-a-School</u> 4th – 5th grade	140	3351	Offered at no cost to schools through community business sponsors
<u>Pollinator Program</u> 1st – 2nd grade	12	264	Offered at no cost by AmeriCorps member
<u>Schools (other) and Public</u> Outreach visits and field trips (Pre-K – college, scouts, summer camps, libraries, visitor's centers, Bird Fest and public programs on Preserve)	58	2851	Intentionally down from over 6,000 last year to account for NC 2.0 move

Photo descriptions, left, top to bottom: AmeriCorps member, Bethany Sheffer, leads a community trash clean-up around the Jackson County Community Center; BMP homeowners enjoy pretzels and Guinness. A well-deserved reward after a St. Patrick's Day Hike!; It's always a joy to see how excited children are to be turned loose on a creek. Experiences like this are what make Balsam Mountain Trust summer camp fun for the little and big kids alike!; Members enjoy a Trust Talk by one of our very own, artist Caryl Killebrew. Stop by the Nature Center to see one of her bear paintings.; Members get crafty making their very own pottery pieces at the Nature Center. Be on the look-out. These one of a kind creations will be displayed in our native plant garden at NC 2.0.



2018 Adopt-a-School Business Sponsors

Lisa Ferguson—Hazelwood
Elementary

Wells Fargo Foundation—
Smokey Mountain Element-
ary and Fairview Elemen-
tary

Sylva Family Practice (Dr.
Roy Gallinger)—Scott's
Creek Elementary

Queen Family Foundation—
Junaluska Elementary

Pavey Law Firm—Jackson
County School of Alterna-
tives

Cullowhee River Club—
Cullowhee Valley Elemen-
tary

Tricia Cox—Summit Charter
School

Barbara Huse—Junaluska
Elementary

Kevin Wells, 1st Citizen's
Bank—Clyde Elementary



2018—The Year We Went “Back to the Future!”

It's always awe-inspiring to see what happens when we celebrate the success of the Trust, illustrated by the support and generosity of the folks who call BMP their home. 2018's Trust Party was no exception. Three BIG CHEERS go to all of the folks who made the event a total and unmitigated success. Hip, Hip Hooray x 3! Thank You!



Resource Stewardship—Honoring a Friend

Due to an increased teaching schedule, as well as other commitments, Trustee Peter Bates, Ph. D., has decided to relinquish his position as a Trustee on our Board. The Trust has been fortunate, indeed, over almost the entire

course of its existence, to have had the privilege and honor of his service. As our longest serving Trustee—Pete, who is an Associate Professor in Natural Resource Conservation and Management; Department of Geosciences and Natural Resources was instrumental in guiding us with the stewardship of BMP's natural resources. Pete's willingness to serve has been invaluable as we walked down the trails and negotiated the many challenges of stewarding the valuable natural resources the Preserve is so privileged to have in its care.

Pete advised the Trust Stewardship Team on many occasions about what might be the best course of action to achieve results that were well thought out, well-constructed and implemented using Best Management Practices to achieve the ends we were seeking.

He will be missed—BUT—he has told us that he's only a phone call away. We think we'll be calling!

Thank you Pete, for all you've done for this organization. CHEERS! The Trust Team

Meanwhile...Back at the Ranch

The Trust continued its vigilance of the resources found on the Preserve throughout the year. We worked

Pete Bates, shown far left, instructing Trust team members in 2003, about the possible best course of action to steward the Preserve's natural resources. At Pete's direction, the Trust and Preserve, made 'best management practices' decisions to ensure the health of the woods on the mountain.

with the Preserve and the Community Association by hiring an independent contractor to treat invasive species found on property. Sunny Himes, who had previously worked for the Trust, was engaged to begin the process of locating and eradicating certain of the most problematic invasive plant species. This is a life-long process as globalization has created many 'shipping lanes' by which species immigrate and emigrate to new climes, landscapes and seascapes.

The natural world is a dynamic system and as such, organisms sometimes have the luxury of adapting to changes in their 'world'. With the assisted movement of certain of these, it becomes an unfair fight. Case in point is kudzu, an 'invasive-exotic' that was brought to the U.S. to control erosion. And while there are certain characteristics of this plant that may endear it to us, e.g., you can make jelly from the flowers; furni-



Plants, such as the kudzu (above) and the armadillo (left) are both found on the Preserve. We're fortunate that neither have established a solid footing here, however. Kudzu is being managed but, since the armadillo was only recently discovered, as part of the bobcat camera trap study, we're not how many may be here. There will eventually need to be a plan established to control this species' spread on the property.



2018 Financial Statement

Operating Revenue

Contributions: individuals, businesses, foundations	\$ 180,454
Events, auctions, ticket sales,	
Gifts-in-Kind	\$ 69,927
Program Revenue	\$ 24,918
Other, e.g., grants, etc.	\$ 1,000

Total Operating Revenue	\$ 276,299
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Operating Expenses by Program

Education	\$ 79,899
Fundraising	\$ 26,438
General & Administrative	\$ 67,656
Nature Center (includes remodel)	\$ 170,128
Resource Stewardship	\$ 6,062

Total Operating Expenses	\$ 350,183
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Depreciation	\$ 10,000
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ture from its woody stems; it's excellent fodder for goats, etc., it is incredibly destructive to the native plants and trees on which it uses gain a light-reaching advantage. It's also one of the fastest growing plants in the world. Even worse, when it establishes itself, it is nearly impossible to destroy.

Discovering armadillos on property was the result of an ongoing predator study facilitated by the Trust, the conservation easement owners, the Community Association and Western Carolina University's Department of Natural Resources.

This study began in 2017 and will continue through at least 2019. Many BMP owners were instrumental in making this program a success by purchasing game-tracker cameras which the principle investigators then placed on property as



well as the Waynesville watershed. The second half of the study will have investigators now looking for red and gray fox as well as coyotes.

Upper photo is a bobcat 'caught' in one of the camera traps as part of the predator study on the Preserve; left is a great shot of a big 'kitty' taken by renowned wildlife photographers and BMP residents Nancy and Steve Ison.



any sightings of these predators on your homesteads or anywhere else on property you might see them. If you can get photos even better.

The Trust will continue to monitor the health of the resources on the Preserve going forward and we hope to be able to provide as much information to BMP owners as possible. If you're interested in participating in our efforts, from a citizen-science perspective please let us know.

Here's to closing another chapter in the Trust's amazing journey!

