



ANNUAL REPORT

2016

A Message from Rob Howard, Chair of the Board of Trustees:

Dear Friends and Supporters of the Balsam Mountain Trust,

On behalf of the Board of Trustees, I'd like to offer a heartfelt "Thank you!" to each of you who supported the Trust with your financial gifts and participation in our many programs. 2016 was another successful year for the Trust, as we continued to provide quality programming for BMP members and for our many partners in the region.

We continued to expand delivery of our valued environmental education programs, and we now teach local children in ten schools in Jackson and Haywood counties. In addition, we provided over 40 programs to civic groups in the surrounding communities.

Our Trust staff has gotten even stronger, with our Senior Naturalist/ Education Coordinator position now being shared by Rose Wall and Jen Knight. We are fortunate indeed to have both of these professionals working with us.

We continued our very successful partnership with AmeriCorps by having Larissa Lopez as our second service intern, which allowed us to further expand our educational offerings to local schools. Bethany Sheffer joined our staff as the new AmeriCorps intern for 2017 and continues the tradition of delivering high value programs to our partners.

Executive Director Michael Skinner continued his leadership role managing our staff transitions, while ensuring we continue to provide quality programming, to you and to our partners in the community. The energy, expertise and professionalism of our entire staff allowed us to deliver memorable learning experiences about the natural world to many, many people.

This is an exciting time at Balsam Mountain Preserve and we continue to work with our Developer to secure a permanent home for the Nature Center over the longer term. Our staff has made additional improvements to our current facility and we hope you will drop by to see them and our animal ambassadors the next time you're on the mountain.

We expect continued success for the Trust in 2017 and this is only possible because of your continued support. On behalf of the Board of Trustees and the Trust staff, I invite you to review the Trust's 2016 Annual Report.

Sincerely,

Rob Howard

Rob Howard, chair



Nature



Culture



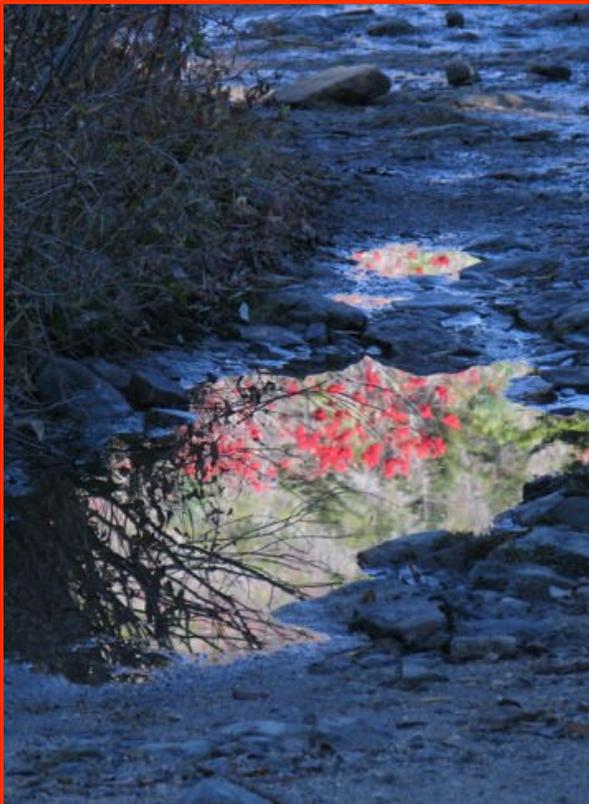
A sense of Place

2016 proved to be another wonderful year of discovery—both from the natural and cultural vantage points of our world—which the Trust offers and facilitates each year on the Preserve for every owner/member.

Photos by: M. Skinner



Top, clockwise: Trust Talk w/Chris Jenkins and snake; BMP member Lisa Guerriero submitted photo; Wikle group, Memorial Tree ceremony; Trust Donor Thank you concert; performers w/BMP member Dianna Dunn; Pool reflection, Black Balsam member hike; Michael and snake demo for Trust campers



Programmatic Themes

The following programmatic themes are the basis for planning the what, when, why and how the Trust delivers to its members, friends and students which help meet its mission:

- **Environmental Education:** which engages, enlightens and entertains audiences of all ages and provides them with the knowledge and tools to engage in the lifetime stewardship of the natural and cultural resources on the Preserve, in western North Carolina and on planet Earth
- **Natural and Cultural Resource Stewardship:** which provides, when planned and applied through best management practices and with engaged stakeholders, for the long-term health and preservation of all resources on BMP
- **Regional Environmental Leadership:** which engages the Trust with other area conservation organizations and stakeholders to meet regional natural and cultural resource conservation goals
- **Experiential Opportunity:** which is the most direct way to engage and encourage the development of an environmental ethos and a sense of place
- **Scientific Research:** which provides stakeholders with the most accurate way of rendering the complexities of the natural world understandable to diverse audiences





The Promise of Fulfilling Our Mission

Michael Skinner, Executive Director

Each year, the Trust, by way of its staff and Board of Trustees, has metrics by which it is able to track and evaluate its progress as a nonprofit organization. And 2016 was no different from most measures, but one big new tool developed was a Strategic Plan which we will use through 2020. We were able to craft this document after numerous meetings, focus groups and a large amount of planning and determination. It was humbling, once again, to be witness to (and be part of) the concerted and selfless efforts expended by the Trust's all-volunteer Board of Trustees. This effort was spearheaded by, and with the leadership of, Rob Howard. Rob not only worked with the staff and Trustees to project manage this effort but also volunteered to stay on after his tenure as chair ended in 2016 to 'reserve the right' to be the project lead for any future Trust endeavors which might employ his building engineering and project management skills.

2016 also realized the continued support from many BMP owners/members. We were able to leverage the continued generosity of our anonymous donor's \$25,000 challenge gift to welcome new donors and as well as increases from past donors. It is always a pleasure to recognize (and appreciate) Trust supporters—whether by way of financial gifts and/or with volunteer efforts.

The year also realized the completion of the Trust's Strategic Plan which is a blueprint for us for the next three years. We will report on the progress of this plan throughout each of the three years by way of using a metrics scorecard and reporting the results in our NaturePhiles. You can find the plan on the Trust website.

The Trust realized some really great programming numbers again in 2016. (Please see the Education section of this report.) This is based on the fact that we have a well-established reputation for quality programming as well as a staff of very talented and highly qualified naturalists. As the newest



Rob Howard, shown being presented with a service award, along with his golden hiking sticks (lower right) by incoming chair Janie Stratigos, was all smiles as he moved into his new role as Emeritus Project Director for the Trust beginning in 2017.

Photo by: M. Skinner



Jen leads a group very engaged young students during a school program presentation. Beginning in 2017 Jen and Rose will job-share the responsibilities of the Senior Naturalist/Education Director position with the Trust.

In addition to the Trust's full-time staff, Jen carried the weight of the naturalist duties in 2016 because of Rose's request to take some time off to be a new mother. Jen was able to successfully continue nurturing, developing and presenting the Trust's programming strategies to realize yet another winning year of environmental education adventures.

The very successful implementation of our AmeriCorps Service Program continued in 2016 as Larissa Lopez passed the torch to Bethany Sheffer. There was a bit of overlap in their service time, which was a fortuitous happenstance for Bethany as she was able to work with Larissa for about a month and a half prior to Larissa's service end date. You can read more about AmeriCorps in that section of this report.

Our living collection of animal ambassadors continued to be popular with program participants throughout 2016. These champions really add a huge element to the interest of program attendees as well as to be catalysts for the environmental education messages we provide.

Finally, the Trust staff remained vigilant in its observations of the state of the natural and cultural resources on the Preserve. There were two new invasive species found on the Preserve in 2016. We will continue to monitor and advise as to the health of the wild side of the Preserve. Please see the Resource Stewardship updates in that section of this report.



Elsie, the Trust's milksnake ambassador, is the official handling test-animal for our AmeriCorps Service members. Bethany (left) and Larissa dived right in and successfully completed their first test. Elsie is utilized as an example of mimicry in nature as it uses its color pattern to mimic that of the highly venomous coral snake.

Education Programming Report

Jen Knight, 2016 Interim Senior Naturalist/Education Coordinator & Rose Wall, Senior Naturalist/Education Coordinator

The completion of the Strategic Plan in 2016 helped us cement our education goals for the next three years. We drafted the following mission and vision statements to guide us towards these new objectives and focus our growth as we move forward.

Mission: Provide cohesive education programming which encourages active environmental conservation in our region.

Vision: Enhance our position as a key environmental education partner with schools and community organizations, reaching diverse audiences and inspiring lifelong stewardship of the natural world.

These directives encompass not only our work here on the Preserve but also our increasing presence in our local communities and Western Carolina region.

Member Programs:

As ever, the Trust's commitment to member enrichment and engagement meant a



The Camp Balsam Trailblazers take advantage of some natural air conditioning during a Sugarloaf Creek hike.

full calendar. 2016 saw a packed Trust Talk series, full session of summer camp, expanded Trust Trek schedule, A Donor Appreciation Concert and a super-groovy Trust Party. The second annual Walk for Wildlife grew in member participation and once again we were able to raise \$1,500 to support local conservation efforts. This year, the grant was awarded to the Mainspring Conservation Trust and their citizen science program that teaches classrooms how to monitor streams for water quality and native fish.

Despite offering more hikes and programs than ever, 2016 also saw a decrease in overall member participation. Our move to a smaller location and general lower population on the mountain may have contributed to this trend. In our continuing effort to better understand member needs we hosted several focus groups and information sessions. Trust staff are incorporating this and other feedback to develop diverse and innova-

tive future programming.

Public Outreach:

Our community education efforts grew substantially in 2016 and we increased our public, non-school participation by 71%. Several factors contributed to this growth including a few particularly well attended Bird of Prey programs at major book signing events. Additionally, we more than doubled the number of pollinator education programs offered by our AmeriCorps member further establishing the Trust as a regional resource in pollinator conservation efforts. These public programs, especially those at libraries and community centers, provide the Trust a platform to reach a diverse and often underserved audience with wildlife education, sustainability resources, and information about the Trust's role in regional conservation efforts.

We also increased our participation in schools by expanding the Adopt-a-School program from 7 Title 1 schools in 2015 to 10 in 2016. Coupled with the introduction of a new 1st



AmeriCorps member, Larissa Lopez, schools the Scotts Creek 4th graders on vertebrate zoology.

grade curriculum in our Monarch/Pollinator Program, we reached more than 3,100 students at no cost to their schools. As a reminder, the Title 1 distinction indicates that at least 35% of the schools' population falls below the poverty line. That percentage is as high as 90% in some of our Jackson and Haywood county schools. Trust programming not only supplements core science education in these districts, it may also inspire the next generation of ecologists, land managers, and conservationists from our region.

AmeriCorps:

Shifting term dates meant we had a total of three AmeriCorps members on site during 2016. In February, we said goodbye to our first member, Becka Walling, and welcomed our second member, Larissa Lopez. Larissa built on Becka's successful 2nd grade Monarch program and created a new 1st grade program that introduces students to the concept of pollination through the establishment of a pollinator garden in the two schools' outdoor areas. The first graders learned about the importance of insects to the life cycles of plants and then had the chance to raise their own milkweed plants in the classroom. In a brilliantly efficient tie-in, the students use these same plants to feed their monarch caterpillars the next year in the 2nd grade program.

When she wasn't teaching Adopt-a-School programs, leading pollinator gardening workshops, or spreading monarch love, Larissa developed several new educational brochures in English and Spanish (this one in an effort to make connections with our local Latino community). She was also instrumental in training our newest AmeriCorps member, Bethany Sheffer, who joined us in November. The AmeriCorps program, which has allowed us to more than triple our reach since we began, continues to be one of the best investments the Trust has made.

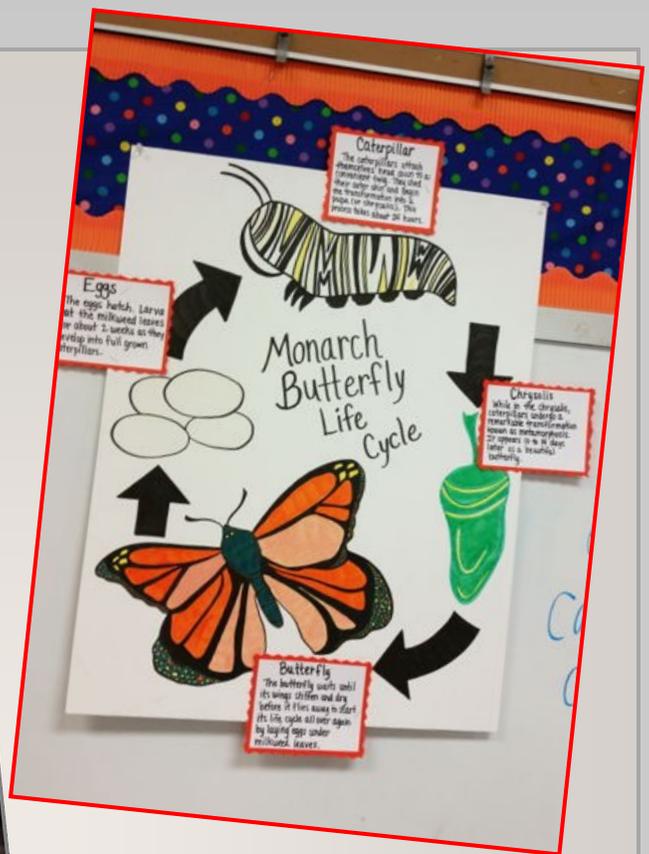
Volunteers:

We were extremely fortunate to retain and expand our stellar volunteer force. Our sixteen animal care volunteers contributed 755 hours of their busy lives to the care and enrichment of our animal ambassadors. Their continued dedication allows us to spend more time teaching, developing new programs, and updating the nature center.

We also welcomed the efforts of Plant Committee member Charlie Harris in getting the Balsam Wildflower Project off the ground. Several members came out to help prepare the plots and sow seeds and we look forward to enjoying the fruits, or flowers, of their labors this spring. Many thanks to all our volunteers and supporters – we couldn't do it without you!



Alex Barnett, a pre-vet student at WCU has been part of a much appreciated and dedicated group of volunteers who have all rendered consistent and effective service to the Trust.



“This program provides our students with hands-on experiences that our rural area would not see otherwise. The students enjoy these programs so much. [After this program], some of the students have mentioned jobs protecting animals.” – Vyanne Fisher, Fairview Elementary

“This program is wonderful! The students enjoy the animals, the visuals, and the variety of grade-appropriate vocabulary is wonderful. My students discuss what they learn in later classes. They want to check books out about the material they learn in this program.” – Amy Kilgore, Junaluska Elementary



Linda Mathias

2016 Education Programs Numbers

The program numbers for 2016 are impressive for a small organization and offer quantifiable proof that the Trust is doing all it can to meet its mission. We're able to do this because of the dedication of the staff, the Board of Trustees, the volunteers and the fact that our program participants are very satisfied with our service.

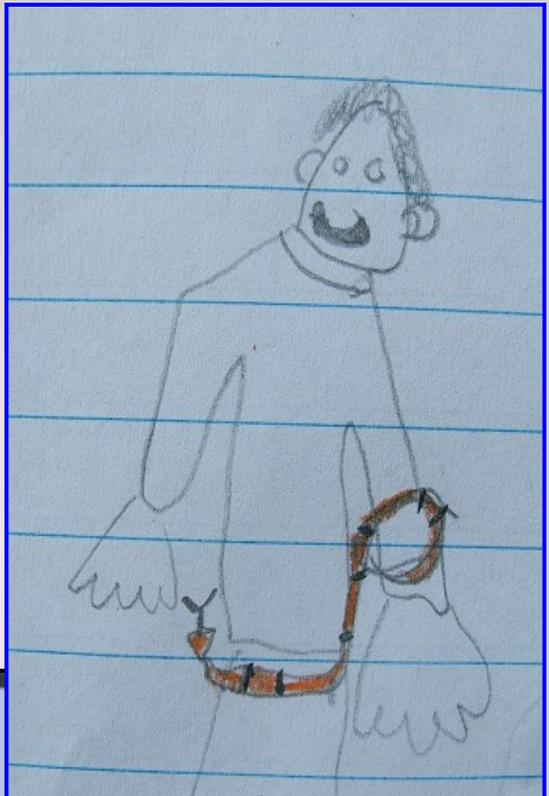
Program Type	Programs Total	Total Attendance	Notes
Member Programs, Interpretive hikes and other special outings, Trust Talks, and Nature Center programs, e.g., feeding frenzies, creature features, summer camp, etc.	145	735	
Drop-in visits to the Nature Center Members and guests drop in and we give them a tour of Nat. Ctr.	60	52	First full year in new location
Adopt-A-School 4 th grade Vertebrate Program, 5 th grade Biodiversity Program	110	2593	10schools
Monarch Program Pilot 2 nd grade pollinator program	28	570	10 schools
Schools Other outreach visits and field trips (PreK – college)	38	1878	
Public Outreach visits and field trips (Scouts, summer camps, libraries, visitor's centers)	45	4485	
Totals	426	10,313	New program attendance record for the Trust

School/Public Programs (Other)	Member Programs By Topic
19 Bird of Prey 31 Fur, Feathers, Scales 19 Pollinator Program 4 Animal Olympics 10 Other/Special Topics	33 Critter Feeding & Flight Programs 86 Interpretive Hikes 26 Other (Trust Talks, Fly Fishing, etc) 45 Walk for Wildlife Participants
	Member Programs High/Low Season
	86 High Season (May 1 – Nov 1) 59 Low Season (Nov 2 – Apr 30)

Trust Program Client Response: A Great Way to Provide Investors (Donors) with Tacit Assurances of Adherence to the Trust's Mission.

Every company, corporation or nonprofit organization should have metrics by which the success of their mission, business plan, etc., is measured. This provides shareholders (stakeholders) with the confidence required to remain as investors. We offer this new category in our Annual Report to provide transparency about our programs and successes. As you'll observe in the following testimonials, our clients can be very demanding and offer their reviews candidly.

Note: Some renderings are merely artistic statements which suggest the efficacy of Trust programming.



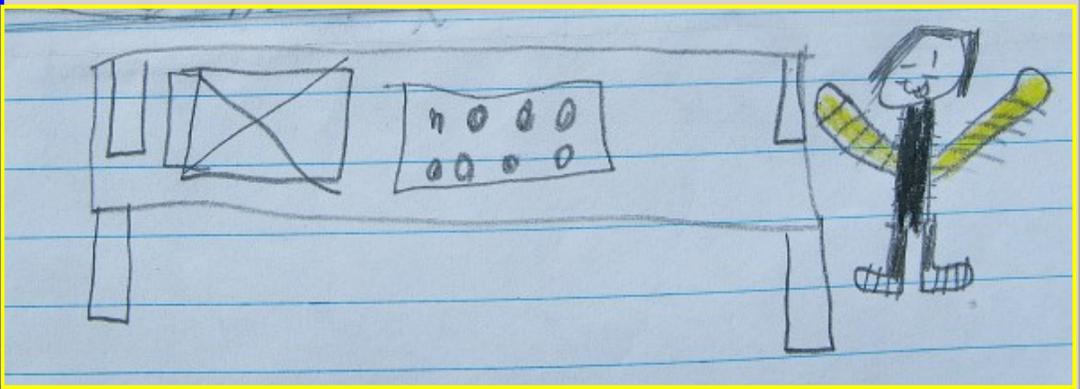
This student's self-portrait is proof-positive that Trust education programs work. He is confidently sporting the latest in fashion—living snake-belt and bracelet. Snakes are often one of the most feared animals humans encounter. Trust programs change those belief systems.

Dear ms. Bethany,
I ENJOYED
The Program Whith
US it was Really Cool
I did not know that
turtles had cold



Artist's rendering of AmeriCorps Service member Bethany Sheffer during an Adopt-A-School presentation.

Client Testimonials, con't.



Dear Ms. Jen,

Thank you for coming I thought that the possum was really cool because he climbed the ladder. I never new that there was skeles on a turkey leg, and I never new that a owl can't turn its head all the way. Thank you so much. My question is can a owl blink? My other question, is did that littel alagater ever bite you?

Love,
Taylor
Taylor



2016 Trust Talks

Trust Talks in 2016 realized, among a steady stream of fascinating topics and speakers, the return of our Artist-in-Residence (AIR) program. Gina Strumpf was the AIR for 2016 and was a delight to have on the mountain. As a friend of Cindy and Al Tunstall, it made the recruiting part of the program easy. She also left a gift to the Trust in the form of a beautiful landscape painting now hanging in the Boarding House. Other Trust Talk speak-



ers also found their way into the hearts and minds of BMP residents. We had wonderful comments from members about this having been the best line-up they could remember. We always look forward to booking and having a wide-range of speakers and topics.

Note: If any BMP member has a suggestion for future speakers please contact us.

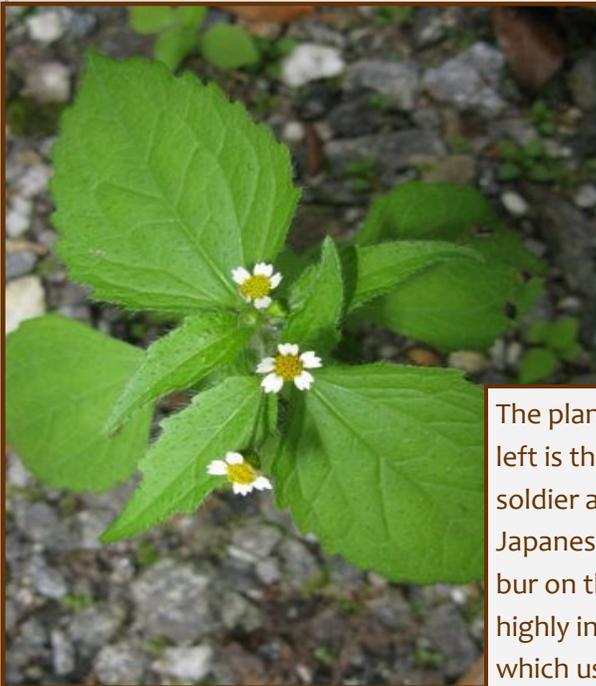


Eastern Band Cherokee member Davy Arch demonstrates his art to BMP members who made a destination trip to the Museum of the Cherokee Indian for one of the Trust Talks presentations in 2016.

Natural and Cultural Resource Stewardship

The Trust again attempted to maintain vigilance over the acreage within the Preserve in 2016 which includes conservation easement, developer and homestead lands. While there are some areas, e.g., invasive species, which remain problematic from a number of perspectives, the good news is that the Preserve remains in pretty good shape related to the degree of infestation with any unwanted species.

Two previously undiscovered invasive species were identified on the Preserve in 2016. They were 1) the gallant soldier (*Galinsoga parviflora*), aka: potato weed, Peruvian daisy, etc., is not an aggressive invasive but 2) the Japanese butter bur (*Petasites japonica*) is highly invasive.



The plant on the left is the gallant soldier aster; the Japanese butter bur on the right is highly invasive, which usually means it will out-compete native plants. A word to all BMP members: if anyone sees either of these critters, PULL THEM UP!!! They're easy to spot as they are found on roadsides.

Research

Two ongoing research pro-

jects chalked up another year of data collection on the Preserve in 2016 with 2017 scheduled to be the third and final year of our ginseng and ramp research projects. The ginseng study is in cooperation with UNC-A and is being partially funded with the Trust's fully-endowed undergraduate research award. The study is investigating different concentrations of the active pharmacological properties of this widely sought plant. The other study, in cooperation with the NC Arboretum and the Cherokee Foundation, consists of studying which harvest methods of the ramp (a popular and native member of the onion family) will be most effective in providing sustainability protocols for this plant throughout its range. Both ginseng (photo at left) and ramps face uncertain futures throughout their respective ranges.



2016 Trust Supporters

The Balsam Mountain Trust would like to acknowledge and thank the donors listed below who contributed to the Trust's success in 2016. 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

Anita & Jan Fredman

Susan Masachi

Black Bear Club (\$5,000—\$9,999)

Marianne Lyon & *Rob Howard,

Linksy, Levinson, Rosenblatt families

Donnajean & Bill Mamrack

Hal & Kate Reed Foundation

Bobcat Club (\$2,500—\$4,999)

Jackie & Bob Fitts, Linda & *Ed James, Karen & Andrew Manidis, Suzanne & Dr. John Morse, Holly & Greg Pollock, Linda & Mac Purdy, Sheri & Dave Straw, Martha & Mike Summerford, Drs. Kimberly & Rick Zimlich

Whitetail Deer Club (\$1,500—\$2,499)

Julie & Sam Belfore, Jan Kohl & Dr. Robert Farquharson, Anne & Jim Kistler, *Linda Outlaw & David Kitchens, Teresa & David May, Elizabeth & Jay Monge, Laura & Brian Philips, Drs. Catherine Enright & Walton Reeves, Shellee & Richard Starr, *Janie & Jim Stratigos, Lizzette & Dr. Karl Van Osten, Drs. Dominique & Michael Toedt

Brook Trout Club (\$500—\$1,499)

Dr. Robert Abney, Countryside Animal Hospital (Dianna & Rich Dunn), Mike Dennis, Ph. D., Julie & Mark Evans, Lou & Thomas Grady, Jeanne & Charles Harris, Elizabeth & Philip Haugaard, Nancy & Steve Ison, Shari & Eric Krueger, Susan Masachi, Rene & Brian Noonan, Nancy & Wayde Seidensticker, Louise & Dave Sparks, Sharon & Ken Torok, Cindy & Al Tunstall, Jean & Dave Walters

2016 Trust Supporters, con't.

Monarch Butterfly Club (up to \$499)

*Mary & Larry Arbaugh, Gale & Dr. Stephen Barnett, Peter Bates, Ph. D., Ann & Bill Boone, O'Hara & Bill Croswell, Rosemarie & Joe Dioguardi, Pam & Mike Frey, Karen & Bob Hannan, Jeffrey Hilliker, Debbie & Paul Lambert, Mary & Ward Mundy, Lynn & Tomas Pokorny, Beth Sorrentino & Michael Skinner, Dr. Randy Smith, Mathew & Daniel Toedt, Margaret Trehern

Trust Party Sponsors

Appalachian Antique Hardwoods, Platt Architecture, P.A., Morgan-Keefe Builders, Shellee Starr, H.H. Walker & Co., Haywood Landscapes, John Landers, Kathryn Greeley Designs, Barbara Matzick, J. Scott Campbell Construction, Thompson Properties, Carol & John Landers

Trust Party Winning Bid Donors

Bobbie & Ken Bowdon, Sandra & Jack Burnett, Jackie & Bob Fitts, Elaine & Michael Fulbright, Marianne Lyon & Rob Howard, Linda & Ed James, Anne & Jim Kistler, Jan Kohl & Bob Farquharson, Shari & Eric Krueger, Carol & John Landers, Donna & Rowdy LeMoine, Dan McAdams, Rene & Brian Noonan, Nancy & Steve Neubeiser, Linda Oulaw & David Kitchens, Nancy & Wayde Scidensticker, Louise & Dave Sparks, Janie & Jim Stratigos, Mary & Bill Staton, Sheri & Dave Straw, Martha & Mike Summerford, Drs. Dominique & Michael Toedt, Sharon & Ken Torok, Cassandra & Jim Watson, Sabrina Watkins & Jim Watson, Cathy & Buddy Wikle

Adopt-A-School

Cashiers Family Dentistry
Cullowhee River Group/Newell Land Group, LLC
Edward Jones/Jack "Chip" Bishop
Lisa Ferguson
First Citizen's Bank
F. Patrick McGuire, DDS Dentistry
Mary McGuire
Pavey Law Firm
Wells Fargo Foundation

In-Kind Contributions

Sunburst Trout Farm
Smoky Mountain News





If there's something everyone on the Preserve likes, it's a good party and the annual Trust party ranks as one of the best on the mountain. Many thanks must be accorded Carol Landers and her team for putting together a fabulously themed and well-attended event.



2016 Financial Statement

Operating Revenue

Contributions: individuals, businesses, foundations	\$ 141,452
Events, auctions, ticket sales	\$ 45,179
Gifts-in-Kind	\$ 80,500
Program Revenue	\$ 19,558
Other, e.g., grants, etc.	\$ 1,183

Total Operating Revenue \$ 287,872

Operating Expenses by Program ¹

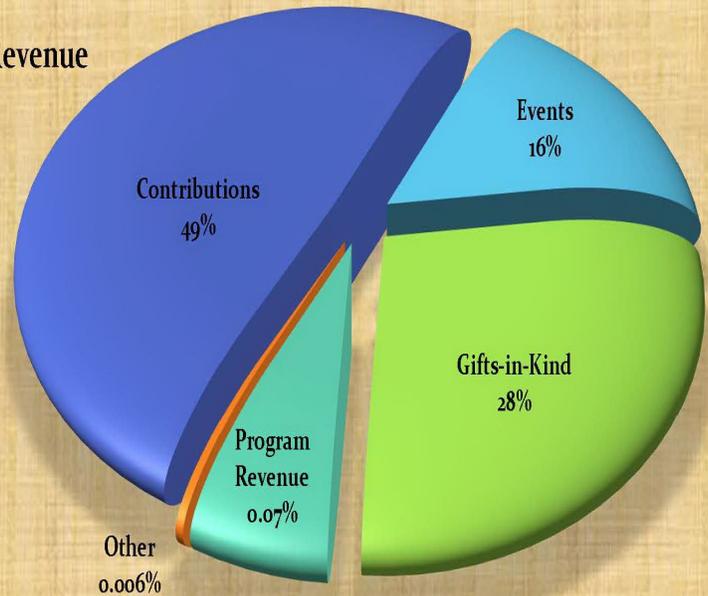
Education	\$ 117,538
Fundraising	\$ 16,373
Gen & Admin	\$ 81,052
Nature Center	\$ 28,353
Resource Stewardship	\$ 4,212

Total Operating Expenses \$ 247,528

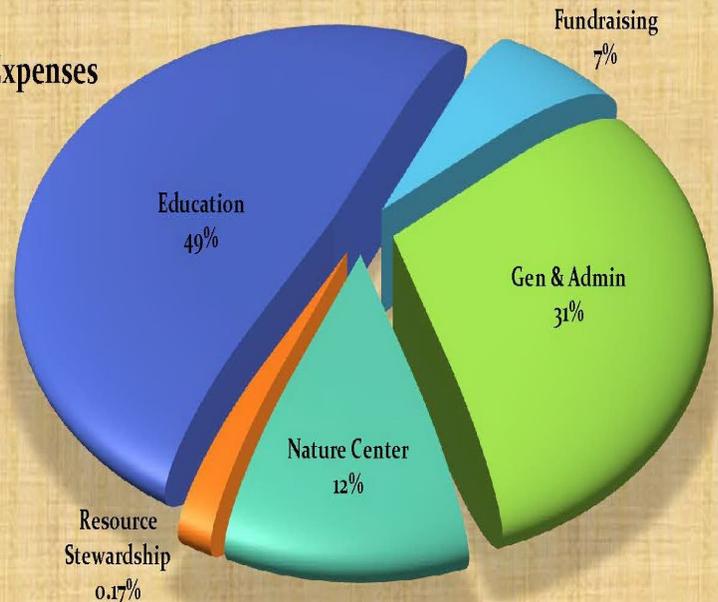
Net Ordinary Income	\$ 40,344
Depreciation	\$ 6,712
Non-Cash Item	(\$80,500)
Net Cash Flow from Operations	(\$33,444)

¹ Salary and benefits have been allocated across programs based on amount of staff hours spent in each program.

Revenue



Expenses



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.

Board of Trustees

Officers:

Rob Howard, Chair

Janie Stratigos, Vice-chair

Ed James, Treasurer

Linda Outlaw, Secretary

Trustees:

Mary Arbaugh

Pete Bates, Ph. D.

Carol Landers

Peter Smith

Sheri Straw

Al Tunstall

Incoming Trustees for 2016

Jan Kohl

Roy Gallinger, M.D.



Trust Administration

Michael Skinner, Executive Director

mskinner@bmtrust.org

828/631-1062

Rose Wall & Jen Knight, Senior Naturalists/Education Directors

education@bmtrust.org

828/631-1061

Larissa Lopez & Bethany Sheffer, AmeriCorps Service Members;

naturalist@bmtrust.org

828/631-1063

Administrator; administrator@bmtrust.org, 828/631-1060

Balsam Mountain Trust

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828/631-1060, Office

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“Without continuous hands-on experience, it is impossible for children to acquire a deep intuitive understanding of the natural world that is the foundation of sustainable development. ... A critical aspect of the present-day crisis in education is that children are becoming separated from daily experience of the natural world, especially in larger cities.” -Natural Learning, Creating Environments for Rediscovering Nature’s Way of Teaching, Robin C. Moore and Herb H. Wong



Trust summer camp participants were immersed (both literally and figuratively) in the wonders of the natural world found right on the Preserve.

“I sincerely believe that for the child, and for the parent seeking to guide him, it is not half so important to know as to feel when introducing a young child to the natural world. If facts are the seeds that later produce knowledge and wisdom, then the emotions and the impressions of the senses are the fertile soil in which the seeds must grow. The years of early childhood are the time to prepare the soil.” -Rachel Carson, A Sense of Wonder <http://natureforkids.net/outdoor-quotes>