

ANNUAL REPORT



2015

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

Bill Mamrack, Treasurer
(end of term)

Linda Outlaw, Secretary

Trustees

Mary Arbaugh

Pete Bates, Ph. D.

Ken Bowdon
(resigned, 2015)

Jack Burnett
(end of term)

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Jeff Murphy
(end of term)

Peter Smith

Janie Stratigos
(Vice-chair beginning 2016)

Incoming Trustees, 2016

Carol Landers

Sheri Straw

Al Tunstall

Note: The Trust staff wishes to offer heartfelt thanks to all who have chosen to serve this organization.

Trust Administration

Michael Skinner, Executive Director
mskinner@bmtrust.org
828/631-1062

Rose Wall, Senior Naturalist/ Education Coordinator
rwall@bmtrust.org
828/631-1061

Jen Knight, Naturalist (Interim)
jknight@bmtrust.org
828/631-1061

Becka Walling, Americorps Service Member
naturalist@bmtrust.org
828/631-1063

Sandi Matson, Administrator (seasonal)
administrator@bmtrust.org
828/631-1060

Balsam Mountain Trust
81 Preserve Road
Sylva, NC 28779
828/631-1060, Office
www.bmtrust.org

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 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



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 generosity and your participation in our many programs . We also appreciate the many wonderful comments our staff continued to receive. We consider that 2015 was a very successful year as we worked to fulfill our mission and to responsibly steward your gifts.

You're undoubtedly aware that the past year saw the involuntary move of the Nature Center to a new location, and while our exhibit space was reduced, our valued animal ambassadors were safely relocated to new and better homes. We will continue to work with BMP's new developer to find a permanent home for the Trust and we'll keep you informed of our progress.

Even with the move, Trust programming expanded, with delivery of our valued education programs to children in eight Jackson & Haywood county schools. In total we provided over 170 programs to audiences in all program categories.

Our Trust Team continued to evolve as well: Senior Naturalist Rose Wall took time off from delivering programs that delighted our members and friends, to deliver beautiful baby Marigny into the world. Congratulations to Rose & Brian. Our new interim naturalist, Jen Knight, came on board to pick up many of Rose's duties and Jen's contributions were immediate and much appreciated.

2015 was the first year the Trust engaged an AmeriCorps service member to expand its educational offerings, and this initiative was a big success. We offer many thanks to Becka Walling for her valuable contribution. Larissa Lopez has joined our staff as the new AmeriCorps member for 2016, and she has picked up right where Becka left off. Please welcome Larissa to the Trust and the Preserve when you see her.

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

We expect continued success for the Trust in 2016, and this is only possible with your continued generous support. On behalf of the Board of Trustees and Trust staff, I invite you to review the Trust's 2015 Annual Report.

SINCERELY,

Rob Howard

ROB HOWARD, CHAIR



Michael Skinner, Executive Director

15 Years and Counting...

It gives me great pleasure to present this 2015 Annual Report to the Trust's supporters, friends, research partners and other stakeholders who have observed, over the Trust's fifteen- year history, a graceful, fulfilling, productive and successful track record of meeting its mission. Thanks are due in large part to the talented and

committed staff and Board members with whom I've had the pleasure to work over the duration of my tenure here, as well as to our generous BMP member supporters and our Adopt-a-School business partners. That well-deserved recognition notwithstanding, I'm also very proud of the relationships and reputation we have with our programming partners. The Trust's mission statement provides the guiding premise by which this organization is constantly striving to meet, to a conclusion which embodies our collective, successful stewarding of this planet's natural (and humanity's cultural) resources.

This annual report provides you with myriad examples of the work the Trust performed in 2015—with, I would add, an admirable rate of success. The continuing presentation of programs for BMP members; our Adopt-a-School programs; the number of programs presented to various audiences in our region; our research projects; our annual Trust party and lastly, the huge expenditure of energy released during our forced move towards the end of the year, all added to what turned out to be another banner year for the Trust.

Looking forward to 2016, we see no let-up in our programming. We're looking forward to adding another school or two to our Adopt-a-School successes of 2015. Our partner organizations, e.g., the National Park Service, U.S. Forest Service, etc., have invited us back and our programming reputation, both inside and outside the Preserve, is solid and growing.

Our volunteer corps provided many hours of unheralded service but in this report they will receive their well-deserved and just recognition.

Please now enjoy this public record of our progress during the past year. And please know that we are acutely aware of the responsibility we have in stewarding the gifts provided to us by you, our donors. Should you ever have any questions about our mission, our processes, service you might be interested in—in the form of serving on the Trust Board, etc., - please stop by and visit.



Of the myriad wonderments in the natural world, the monarch (here pictured transforming from caterpillar to pupa) is very special to the Trust, as it has now undertaken a very important and challenging project to assist with increasing this very important insect's numbers in the wild.

The Trust began a pollinator program and monarch rearing project in 2015, managed by our first AmeriCorps service member, Becka Walling. The project was an unmitigated success and the Trust will continue with the project in the years to come.

This project is but one of many in which your Trust is proud to be involved.

Photo by Lisa Guerriero



Education Programming Report

Rose Wall, Senior Naturalist/Education Coordinator

(Editor's note: Rose will be on maternity leave for 2016. Jen Knight is her interim replacement.)

In 2015 we crafted a new mission statement: Balsam Mountain Trust inspires people to become responsible stewards of the natural and cultural resources of the southern Blue Ridge Mountains through education and conservation leadership. This mission has renewed our passion to inspire people to learn about and protect their natural environments and to have fun doing it!

The Trust offers programs to three primary groups: BMP members, local schools and the general public.

BMP Member Programs and Outings:

We strive to introduce homeowners to the wonders of nature in many different ways. Members enjoyed hikes, nature photography, weekly Feeding Frenzies, Trust Talks and more. The kids and/or grandkids of BMP members also took advantage of our summer camp, as well as our seasonal craft table. 2015 realized the introduction of a new program: Walk for Wildlife! We sought to reach a greater number and diversity of members through this pedometer challenge. Forty-three folks joined in on the competition,

more than doubling our step goal, and walking the equivalent of the Earth's circumference - WOW! In addition to being a fun activity, Walk for Wildlife was a fundraiser to support regional conservation efforts.

The Trust awarded this competitive grant of \$1,500 to Smokey Mountain High School teacher, Amanda Clapp. She will use the money to give her students hands-on skills through restoring a local stream and having them teach elementary school students about their experience.



There are many BMP members who are regulars on scheduled hikes such as the Sunday Trust Treks, as well as other adventures, planned both on and off the Preserve.



Rose initiated the Trust's first Walk for Wildlife that was real hit with BMP members. Eric Krueger is pictured winning one of the many major shoe awards for his effort in the project. Money raised during this event allowed the Trust to offer a conservation grant to the winner, picked from a group of local applicants—each of whom had to apply. (See next page)

Public Outreach:

We continue to offer Edu-tainment to local folks of all ages, with themes such as: Birds of Prey, Animal Nursery Rhymes and Web of Life. This year, we ramped up our outreach at the local libraries. Following the National Summer Reading Program Theme: "Heroes", we presented a fun program featuring Mother Nature as a superhero with the children in the audience serving as her sidekicks. Library programs allow us to reach large audiences with people from many different cultural and socio-economic backgrounds,



A beaming Rose mugs for the press along with BMP member Sharon Torok—another major award winner in the Walk for Wildlife contest. The Trust plans to continue this successful project in 2016 so get those feet primed and ready.



Students from Walk for Wildlife grant-winner Smokey Mountain High School's Environmental Science class (lead teacher Amanda Clapp) present their proposal to their classmates as part of their assignment, which is how the grant money was applied. The Trust received a number of grant applications from some well-established organizations in western North Carolina. The Walk for Wildlife program will continue in 2016.

while educating them about the value of Balsam Mountain Preserve and the Trust. In addition to schools and libraries, we also reached people at visitor centers and summer camps.

AmeriCorps:

In 2015, the Trust became an AmeriCorps service site and hosted its first member, Becka Walling. AmeriCorps seeks to reach and enrich the lives of underserved U.S. citizens and this particular branch is right up our alley, with a focus on environmental education. During her 10-month tenure, Becka grew our Adopt-a-School program to reach 2,455 4th and 5th grade students at seven Title 1 schools (Title 1 schools have greater than 35 % of students living in poverty).

In line with our goal to expand our target audience, Becka also created monarch-themed programs for 1st and 2nd graders. Like our Adopt-a-School program, we delivered hands-on experiences to these classrooms, visiting multiple times throughout the year. We believe this model is the best way to impact students for the long-term. This pilot program reached 6 classrooms, and 350 students, at two target schools. Children learned about monarch biology through puppets, song and dance, crafts and even rearing and releasing their own butterflies. Cultural lessons were also introduced when talking about the different places monarchs visit during migration, including making connections with schools in Mexico. This new partnership with AmeriCorps was successful beyond our expectations and is something we plan to continue in future years.

Many BMP members also caught monarch fever this year thanks to Becka Walling and the rest of the Trust staff's focus on this charismatic insect. Members were able to view the different stages of meta-



Becka has a final encounter with one of her many 'children' she raised while serving the Trust as its first AmeriCorps service member. The success of this project is but one way in which small efforts for conservation yield very large results. 2015 realized the largest increase in over-wintering monarchs in many, many years. Three cheers for Becka! The Trust salutes you!

The Trust celebrated the success and dedication of its volunteer corps in 2015 with a cookout at the Nature Center. Volunteers have provided invaluable service to the Trust—as they do for many non-profits. And while there is a dollar value that can be assigned to their service, most nonprofits would be hard-pressed to quantify the real value of their willingness to perform their service that really is what does them justice. Thank You!

morphosis in our home-made monarch nursery, with several lucky folks getting the chance to release some of the 75 adults we reared and wish them well on their journey to Mexico. With the help of members, we also created a pollinator garden by the Pavilion tennis courts. Be on the lookout for this garden to “grow” in future years. Who knows, we may even get to see some tagged butterflies show up at the garden.

“It was so nice to have someone so knowledgeable visit the classes. She (Becka) did an amazing job with the children and was always there for us! Absolutely loved this program!” - Beverly King, Cullowhee Valley School

Volunteers:

We grew our volunteer program from 4 to 13 in 2015, in addition to hosting 2 WCU interns. We also welcomed BMP resident volunteer, Sunny Quinn, a true animal lover who served our animal ambassadors well. We send a big THANK YOU! to these committed folks. Without them to assist in caring for our animals, we would not be able to provide nearly as many education programs. We would love to involve more BMP residents, so give us a holler if you'd like to help.

Education program numbers are presented on the following page.



From left to right: Mathew Toedt (w/Chayton); Becka Walling, Rose Wall, Bret Ladrie, Bill Williams, Margy Trehern and Lisa Guerriero (w/Rasta) were part of the cookout crew the Trust had to honor its volunteers in 2015.

2015 Education Programs Numbers

The program numbers for 2015 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	Number Offered	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.	111	738	Limited programming mid Oct - mid Dec due to move
Drop-in visits to the Nature Center Members and guests drop in and we give them a tour of Nat. Ctr.	87	138	Nature Center closed for move in Nov
Adopt-A-School 4 th grade Vertebrate Program, 5 th grade Biodiversity Program	104	2410	7 schools
Monarch Program Pilot 2 nd grade pollinator program	4	350	2 schools
Schools Other outreach visits and field trips (PreK – college)	23	1673	
Public Outreach visits and field trips (Scouts, summer camps, libraries, visitor's centers)	38	2622	

School/Public Programs (Other)	Member Programs By Topic
20 Bird of Prey 6 Web of Life 2 Fur, Feathers, Scales 4 Library Superheroes 7 Pollinator Program	22 Critter Feeding Programs 6 Birds of Prey 59 Interpretive Hikes 24 Other (Trust Talks, Fly Fishing, Kayaking, etc)
	Member Programs High/Low Season
	74 High Season (May 1 – Nov 1) 36 Low Season (Nov 2 – Apr 30)

"Excellent program! Great hands-on activities. Students are actively engaged. [After this program] students are more compassionate towards animals." - Kim Stiwinter, Summit Charter



Rose introduces some Swain County 5th graders to a scaly friend as part of the Adopt-A-School program.

"The students are really engaged in learning during the presentations. The hands on materials are an invaluable part of our curriculum. The presenter is very knowledgeable and we always have many new discoveries when she is here!"
- Morag Miller, Fairview Elementary



AmeriCorps member Becka Walling shares monarchs with some young library-goers.

Becka had this to say about her AmeriCorps experience with the Trust, "I didn't realize, when I began my tour with the Trust, that I would end up becoming as passionate as I have about teaching, especially environmental education. I now plan to make this a career—path goal."



Trust Executive Director Michael Skinner edu-tains a crowd with our resident diva, Cheyenne, a (now) 6-year old female red-tailed hawk. The Trust's bird of prey program remains its most popular offering and has established the Trust as one of the premier environmental education facilitators in the region.

Below, left: Ken Bowdon lent his expertise to summer camp participants by donning his hard-rock geologist hard hat.

Below right: Cindy Tunstall is a person beyond happy as she worked on creating the pollinator garden for the Trust. Many BMP residents took part in Trust activities in 2015 and we look forward to having more in 2016.

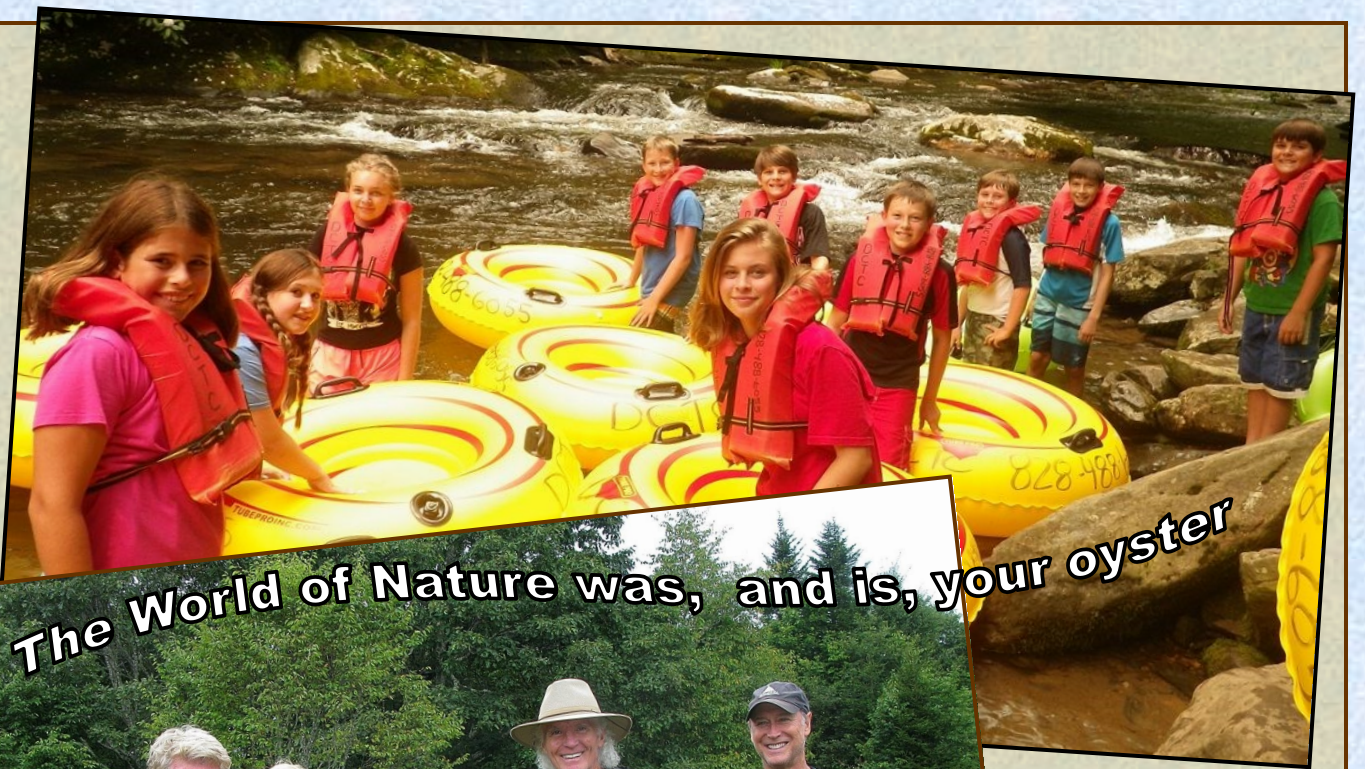


Yes, truly, pictures do say things
in 1,000 words (more or less)!



BMP family members having fun with the Trust in 2015





The World of Nature was, and is, your oyster



2015 Trust Talks

2014 Trust Talks brought a diverse, talented and very-well received group of speakers to the Preserve. With that too, the largest total attendance ever recorded was realized for this exciting series. From Earth—bound comedy to earth—ground, home-made soil to celestial seasonings to blacksmithing, 2015's Trust Talks had a little bit of everything for every one who attended and 2016 bodes well for a very eclectic group of speakers.

The Trust is very proud of the quality of the subject matter and subject presenters it continues to bring to BMP members.

2015 Natural/Cultural Resource Management

The Trust facilitated two start-up research projects in 2015. One was a study to help determine the quality and effectiveness of the active chemical compounds in the ginseng (*Panax quinquefolius*) plant. Referred to as ginsenosides, these compounds are

proving to be medicinally beneficial to humans.

This study is taking place under the auspices of the Trust's fully funded UNC-A undergraduate research award.

The other study, headed up by the North Carolina Arboretum and the Cherokee Foundation, along with the University of Virginia and the U.S. Forest Service, investigates harvesting methods of ramps (*Allium tricoccum*) to determine best management practices for sustaining wild populations of this very popular wild edible.



Ginseng, above, is the most sought after wild herb in the mountains because of the high medicinal quality of the plants found here. It is harvested both legally and illegally because of this fact.



Above: Local dirt grower Rob Howard is shown working the crowd into a frenzy of what turned out to be a very dirty presentation.

Below: Local 'smithy' David Burress shared his skill at the forge during a demonstration Trust Talk.



2015 Trust Supporters

The Balsam Mountain Trust would like to acknowledge and thank the donors listed below who contributed to the Trust's success in 2015. 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

Jane Parker & Beckie Yon

Terry & Dr. Thomas O'Neill



Black Bear Club (\$5,000—\$9,999)

Bank of America

Harry Avant

Wanda & Dr. John Boineau

Tracy & Michael Eklund

Balsam Mountain Group, LLC

Marianne Lyon & *Rob Howard,

Linksy, Levinson, Rosenblatt families

Donnajeane & *Bill Mamrack

Teresa & David May

Hal & Kate Reed Foundation

Clary McCall & Robert Granieri

Manning Moxley

Bobcat Club (\$2,500—\$4,999)

Charles Beacham, Mary & Dan Connell, Jackie & Bob Fitts, Lisa & Sal Guerriero, Linda & *Ed James, Karen & Andrew Manidis, Suzanne & Dr. John Morse, Vanita & Harry Morgan, Holly & Greg Pollock, Mary & Bill Staton, Martha & Mike Summerford, Drs. Dominique & Michael Toedt, Drs. Kimberly & Rick Zimlich

Whitetail Deer Club (\$1,500—\$2,499)

Balsam Mountain Builders, Mary & Marshall Bassett, Drs. Andi & Robert Colton, Jan Kohl & Dr. Robert Farquharson, Anne & Jim Kistler, *Linda Outlaw & David Kitchens, Donna & Rowdy LeMoine, Elizabeth & Jay Monge, Jane & Phillip Moon, Suzanne & Dr. John Morse, Drs. Catherine Enright & Walton Reeves, *Janie & Jim Stratigos, Sheri & Dave Straw, Lizzette & Dr. Karl Van Osten, Cassandra & Rick Watson, Cathy & Dr. Buddy Wikle

2015 Trust Supporters, con't.

Brook Trout Club (\$500—\$1,499)

*Mary & Larry Arbaugh, Electra & Mills Ariail, EJ Balsam, Julie & Sam Belfore, Broadbooks Assoc., Faith & Walter Bromm, J. Scott Campbell Construction, Dr. Mirtha Casimir, Glenda Dorety, Elaine & Michael Fulbright, Cynthia & Dr. Roy Gallinger, Marsha & Murray Goldman, Lou & Thomas Grady, Jeanne & Charles Harris, Elizabeth & Philip Haugaard, High Ridge Custom Homes, Haywood Landscapes, Barbara & Dr. Scott Huse, Shari & Eric Krueger, Carol & John Landers, Bo Long, Susan Masachi, Susan & Joshua Nemzoff, Claire & Randy Parker, Platt Architecture, Peggy & Dr. Gregory Samano, Louise & Dave Sparks, Terrick Holdings, LLC, Cindy & Al Tunstall, Jean & Dave Walters

Monarch Butterfly Club (up to \$499)

Gale & Dr. Stephen Barnett, Peter Bates, Ph. D., Ann & Bill Boone, Morgan—Keefe Builders, Elizabeth & Robert Catlin, O'Hara & Bill Croswell, Rosemarie & Joe Dioguardi, Andi Eaton, Ann & Art Edgerton, Karen & Bob Hannan, Susan & Shawn Harrison, Jo Marie & Robert Hebler, Jeffrey Hilliker, Sandy & Nathan Leder, Hon. Brad Letts, Ann & Michael Mazenko, Leslie & Jim Moster, Mary & Ward Mundy, Beth Sorrentino & Michael Skinner, Mathew & Daniel Toedt, Margaret Trehern, John Tuten

Adopt-A-School

Cashiers Family Dentistry
Cullowhee River Group/Newell Land Group, LLC
Edward Jones/Jack Bishop
Earwood & Moore
Patrick McGuire, DDS Dentistry
Taylor Motor Group
Wells Fargo Bank
Wells Fargo Foundation

In-Kind Contributions

Sunburst Trout Farm
Smoky Mountain News



Financial Statement

Operating Revenue

Contributions: individuals, businesses, foundations	\$ 221,446
Events, auctions, ticket sales	\$ 9,320
Gifts-in-Kind	\$ 4,807
Program Revenue	\$ 9,450
Other	\$ 305

Total Operating Revenue \$ 245,328

Operating Expenses¹

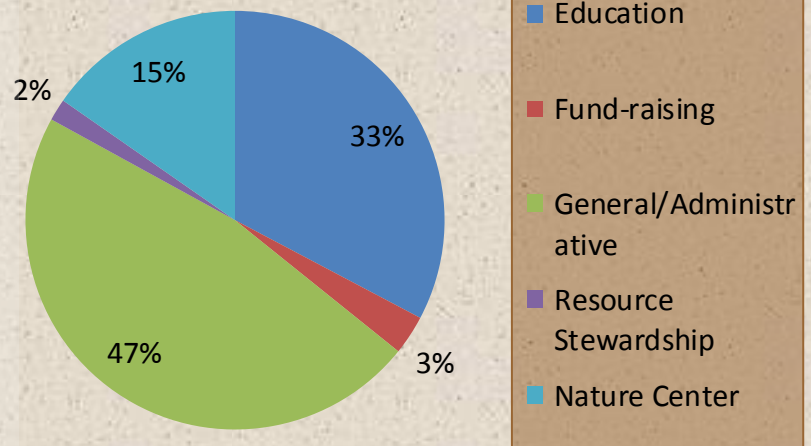
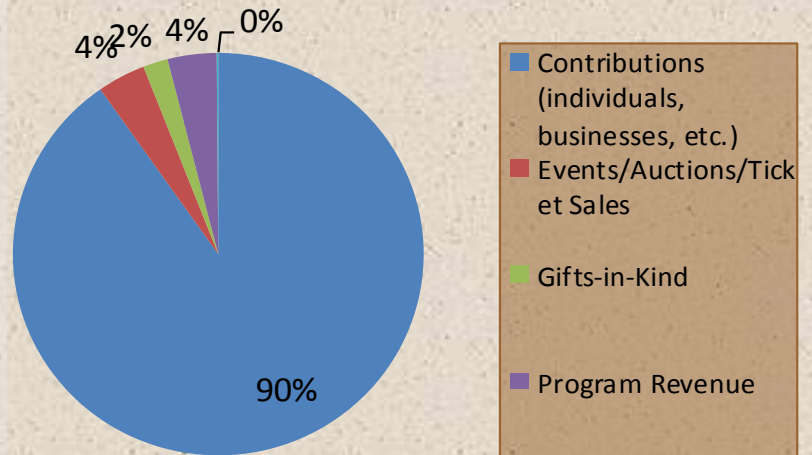
Education	\$ 92,298
Fund-raising	\$ 8,593
General/Administrative ²	\$ 133,130
Resource Stewardship	\$ 4,774
Nature Center	\$ 43,191

Total Operating Expenses \$ 281,986

Net Operating Income³ <\$ 36,658>

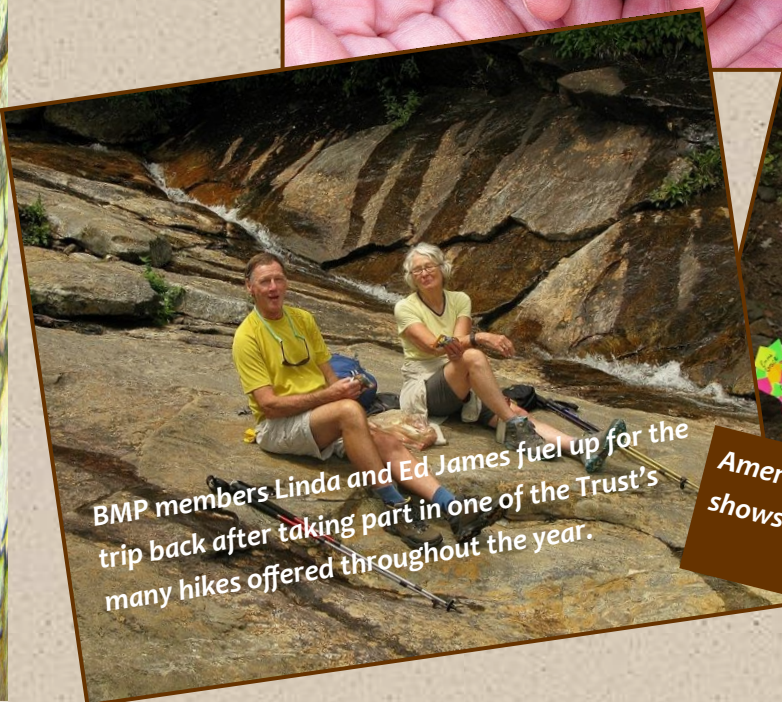
Superscript notes:

- 1) Payroll expense is allocated across programs based on the amount of time employees spend on each program type.
- 2) Includes depreciation expense of \$28,128 and legal expense of \$37,727
- 3) Legal expenses (which we believe to be non-recurring) was the main reason for 2015 net operating loss



The land ethic simply enlarges the boundaries of the community to include soils, waters, plants, and animals, or collectively: the land... In short, a land ethic changes the role of *Homo sapiens* from conqueror of the land-community to plain member and citizen of it. It implies respect for his fellow-members, and also respect for the community as such."

— Aldo Leopold



BMP members Linda and Ed James fuel up for the trip back after taking part in one of the Trust's many hikes offered throughout the year.



Americorps service member Becka Walling shows off her students' folk art butterflies.