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Return of Organization Exempt From Income Tax

2002

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

Open to Public Inspection

Department of the Treasury Internal Revenue Service

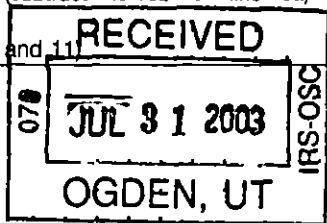
The organization may have to use a copy of this return to satisfy state reporting requirements

Header section containing organization name (Boxerwood Education Association), address (Lexington VA), EIN (29-18-DF-54-1937944), and other identifying information.

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances

Main table with 21 rows detailing revenue (Total: 146,132), expenses (Total: 112,584), and net assets (Total: 43,876).

SCANNED SEP 02 2003



**Part II Statement of Functional Expenses**

All organizations must complete column (A). Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others. (See page 21 of the instructions.)

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22	Grants and allocations (attach schedule) (cash \$ _____ noncash \$ _____)				
23	Specific assistance to individuals (attach schedule)				
24	Benefits paid to or for members (attach schedule)				
25	Compensation of officers, directors, etc.	54,671	49,671	2,500	2,500
26	Other salaries and wages	7,530	7,530		
27	Pension plan contributions				
28	Other employee benefits				
29	Payroll taxes	4,756	4,374	191	191
30	Professional fundraising fees	13,064			13,064
31	Accounting fees	150		150	
32	Legal fees				
33	Supplies	35	35		
34	Telephone				
35	Postage and shipping	1,281	978		303
36	Occupancy	1,200	1,200		
37	Equipment rental and maintenance	848	848		
38	Printing and publications				
39	Travel	26	26		
40	Conferences, conventions, and meetings				
41	Interest				
42	Depreciation, depletion, etc. (attach schedule)				
43	Other expenses not covered above (itemize): a				
	b SEE STATEMENT 1	29,023	17,969	262	10,792
	c				
	d				
	e				
44	Total functional expenses (add lines 22 through 43). Organizations completing columns (B)-(D), carry these totals to lines 13-15.	112,584	82,631	3,103	26,850

**Joint Costs.** Check  if you are following SOP 98-2

Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services?  Yes  No  
 If "Yes," enter (i) the aggregate amount of these joint costs \$ \_\_\_\_\_, (ii) the amount allocated to Program services \$ \_\_\_\_\_, (iii) the amount allocated to Management and general \$ \_\_\_\_\_, and (iv) the amount allocated to Fundraising \$ \_\_\_\_\_

**Part III Statement of Program Service Accomplishments** (See page 24 of the instructions)

What is the organization's primary exempt purpose? <b>SEE STATEMENT 2</b>	Program Service Expenses (Required for 501(c)(3) and (4) orgs. and 4947(a)(1) trusts but optional for others)
a <b>SEE STATEMENT 3</b>	
(Grants and allocations \$ _____)	82,631
b	
(Grants and allocations \$ _____)	
c	
(Grants and allocations \$ _____)	
d	
(Grants and allocations \$ _____)	
e Other program services (attach schedule) (Grants and allocations \$ _____)	
f Total of Program Service Expenses (should equal line 44, column (B), Program services)	

**Part IV Balance Sheets** (See page 24 of the instructions)

Note		Where required, attached schedules and amounts within the description column should be for end-of-year amounts only		(A) Beginning of year		(B) End of year	
Assets	45	Cash—non-interest-bearing		3,556	45	43,876	
	46	Savings and temporary cash investments		3,711	46		
	47a	Accounts receivable	47a				
	b	Less allowance for doubtful accounts	47b		47c		
	48a	Pledges receivable	48a				
	b	Less allowance for doubtful accounts	48b		48c		
	49	Grants receivable			49		
	50	Receivables from officers, directors, trustees, and key employees (attach schedule)			50		
	51a	Other notes and loans receivable (attach schedule)	51a				
	b	Less allowance for doubtful accounts	51b		51c		
	52	Inventories for sale or use			52		
	53	Prepaid expenses and deferred charges			53		
	54	Investments—securities (attach schedule) <input type="checkbox"/> Cost <input type="checkbox"/> FMV			54		
	55a	Investments—land, buildings, and equipment basis	55a				
	b	Less accumulated depreciation (attach schedule)	55b		55c		
	56	Investments—other (attach schedule)			56		
	57a	Land, buildings, and equipment basis	57a				
	b	Less accumulated depreciation (attach schedule)	57b		57c		
58	Other assets (describe <input type="checkbox"/> )			58			
59	<b>Total assets</b> (add lines 45 through 58) (must equal line 74)			7,267	59	43,876	
Liabilities	60	Accounts payable and accrued expenses		2,315	60	5,376	
	61	Grants payable			61		
	62	Deferred revenue			62		
	63	Loans from officers, directors, trustees, and key employees (attach schedule)			63		
	64a	Tax-exempt bond liabilities (attach schedule)			64a		
	b	Mortgages and other notes payable (attach schedule)			64b		
	65	Other liabilities (describe <input type="checkbox"/> )			65		
66	<b>Total liabilities</b> (add lines 60 through 65)			2,315	66	5,376	
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 67 through 69 and lines 73 and 74						
	67	Unrestricted			67		
	68	Temporarily restricted			68		
	69	Permanently restricted			69		
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 70 through 74						
	70	Capital stock, trust principal, or current funds			70		
	71	Paid-in or capital surplus, or land, building, and equipment fund			71		
	72	Retained earnings, endowment, accumulated income, or other funds			4,952	72	38,500
	73	<b>Total net assets or fund balances</b> (add lines 67 through 69 or lines 70 through 72, column (A) must equal line 19, column (B) must equal line 21)			4,952	73	38,500
	74	<b>Total liabilities and net assets / fund balances</b> (add lines 66 and 73)			7,267	74	43,876

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization. How the public perceives an organization in such cases may be determined by the information presented on its return. Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments.

**Part IV-A Reconciliation of Revenue per Audited Financial Statements with Revenue per Return** (See page 26 of the instructions)

<b>a</b>	Total revenue, gains, and other support per audited financial statements ▶	<b>a</b>
<b>b</b>	Amounts included on line <b>a</b> but not on line 12, Form 990	<b>b</b>
(1)	Net unrealized gains on investments \$	
(2)	Donated services and use of facilities \$	
(3)	Recoveries of prior year grants \$	
(4)	Other (specify)	
	\$	
	Add amounts on lines (1) through (4) ▶	<b>b</b>
<b>c</b>	Line <b>a</b> minus line <b>b</b> ▶	<b>c</b>
<b>d</b>	Amounts included on line 12, Form 990 but not on line <b>a</b>	<b>d</b>
(1)	Investment expenses not included on line 6b, Form 990 \$	
(2)	Other (specify)	
	\$	
	Add amounts on lines (1) and (2) ▶	<b>d</b>
<b>e</b>	Total revenue per line 12, Form 990 (line <b>c</b> plus line <b>d</b> ) ▶	<b>e</b>

**Part IV-B Reconciliation of Expenses per Audited Financial Statements with Expenses per Return**

<b>a</b>	Total expenses and losses per audited financial statements ▶	<b>a</b>
<b>b</b>	Amounts included on line <b>a</b> but not on line 17, Form 990	<b>b</b>
(1)	Donated services and use of facilities \$	
(2)	Prior year adjustments reported on line 20, Form 990 \$	
(3)	Losses reported on line 20, Form 990 \$	
(4)	Other (specify)	
	\$	
	Add amounts on lines (1) through (4) ▶	<b>b</b>
<b>c</b>	Line <b>a</b> minus line <b>b</b> ▶	<b>c</b>
<b>d</b>	Amounts included on line 17, Form 990 but not on line <b>a</b>	<b>d</b>
(1)	Investment expenses not included on line 6b, Form 990 \$	
(2)	Other (specify)	
	\$	
	Add amounts on lines (1) and (2) ▶	<b>d</b>
<b>e</b>	Total expenses per line 17, Form 990 (line <b>c</b> plus line <b>d</b> ) ▶	<b>e</b>

**Part V List of Officers, Directors, Trustees, and Key Employees** (List each one even if not compensated, see page 26 of the instructions)

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (If not paid, enter -0-)	(D) Contributors to employee benefit plans & deferred compensation	(E) Expense account and other allowances
SEE STATEMENT #4				

**75** Did any officer, director, trustee, or key employee receive aggregate compensation of more than \$100,000 from your organization and all related organizations, of which more than \$10,000 was provided by the related organizations?  Yes  No  
 If "Yes," attach schedule—see page 26 of the instructions

Part VI Other Information (See page 27 of the instructions)

		Yes	No
76	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity		X
77	Were any changes made in the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes		X
78a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?		X
79	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement		X
80a	Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc., to any other exempt or nonexempt organization?		X
b	If "Yes," enter the name of the organization _____ and check whether it is <input type="checkbox"/> exempt or <input type="checkbox"/> nonexempt		
81a	Enter direct or indirect political expenditures See line 81 instructions [81a] _____		
b	Did the organization file Form 1120-POL for this year?		X
82a	Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?		X
b	If "Yes," you may indicate the value of these items here Do not include this amount as revenue in Part I or as an expense in Part II (See instructions in Part III) [82b] _____		
83a	Did the organization comply with the public inspection requirements for returns and exemption applications?	X	
b	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	X	
84a	Did the organization solicit any contributions or gifts that were not tax deductible?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
85	501(c)(4), (5), or (6) organizations a Were substantially all dues nondeductible by members? b Did the organization make only in-house lobbying expenditures of \$2,000 or less? If "Yes" was answered to either 85a or 85b, do not complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year		
c	Dues, assessments, and similar amounts from members [85c] _____		
d	Section 162(e) lobbying and political expenditures [85d] _____		
e	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices [85e] _____		
f	Taxable amount of lobbying and political expenditures (line 85d less 85e) [85f] _____		
g	Does the organization elect to pay the section 6033(e) tax on the amount on line 85f? [85g] _____		
h	If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year? [85h] _____		
86	501(c)(7) orgs Enter a Initiation fees and capital contributions included on line 12 b Gross receipts, included on line 12, for public use of club facilities		
87	501(c)(12) orgs Enter a Gross income from members or shareholders b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)		
88	At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Part IX		X
89a	501(c)(3) organizations Enter Amount of tax imposed on the organization during the year under section 4911 _____, section 4912 _____, section 4955 _____		
b	501(c)(3) and 501(c)(4) orgs Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," attach a statement explaining each transaction		X
c	Enter Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 _____		
d	Enter Amount of tax on line 89c, above, reimbursed by the organization _____		
90a	List the states with which a copy of this return is filed _____		
b	Number of employees employed in the pay period that includes March 12, 2002 (See instructions) [90b] _____		
91	The books are in care of Located at Telephone no ZIP + 4		
92	Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the tax year _____		

N/A  
10/A  
N/A

N/A  
N/A

8

NONE

HUNTER MOHRING  
963 ROSS ROAD, LEXINGTON, VA.

(540) 463-2697  
24450

**Part VII Analysis of Income-Producing Activities** (See page 31 of the instructions)

Note Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512 513 or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
93 Program service revenue					
a <u>ADMISSIONS</u>					16,067
b					
c					
d					
e					
f Medicare/Medicaid payments					
g Fees and contracts from government agencies					
94 Membership dues and assessments					31,985
95 Interest on savings and temporary cash investments					261
96 Dividends and interest from securities					
97 Net rental income or (loss) from real estate					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from personal property					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory					
101 Net income or (loss) from special events					2,562
102 Gross profit or (loss) from sales of inventory					
103 Other revenue a					
b					
c					
d					
e					
104 Subtotal (add columns (B) (D), and (E))					
105 Total (add line 104 columns (B), (D) and (E))					\$ 50,885

Note Line 105 plus line 1d Part I, should equal the amount on line 12, Part I

**Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes** (See page 32 of the instructions)

Line No	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes)
93	ADMISSIONS ARE CHARGED FOR EDUCATIONAL PROGRAMS
94	MEMBERS PAY ANNUAL FEE FOR ADMISSION, NEWSLETTER, ETC.
95	INTEREST IS EARNED ON TEMPORARY IDLE FUNDS SEE STATEMENT #5

**Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities** (See page 32 of the instructions)

(A) Name, address and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
N/A	%			
	%			
	%			
	%			

**Part X Information Regarding Transfers Associated with Personal Benefit Contracts** (See page 33 of the instructions)

- (a) Did the organization, during the year, receive any funds directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No
- (b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No

Note If "Yes" to (b), file Form 8870 and Form 4720 (see instructions)

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Please Sign Here  
 Signature of officer: Hunter Mohring Date: 7/25/2003  
 Type or print name and title: HUNTER MOHRING EXECUTIVE STEWARD

Paid Preparer's Use Only  
 Preparer's signature: \_\_\_\_\_ Date: \_\_\_\_\_ Check if self-employed:   
 Firm's name (or yours if self-employed) address and ZIP + 4: \_\_\_\_\_ EIN: \_\_\_\_\_  
 Phone no: \_\_\_\_\_

Boxerwood Education Association, Inc

54-1937944

FYE 6/30/2003

**FEDERAL STATEMENTS**

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**Statement 1 - Form 990, Part 11, Line 43 - Other Functional Expenses**

Description	Total Expenses	Program Service	Mgt & General	Fund-Raising
<b>Expense</b>				
Advertising	\$1,493	\$1,493		
Donation	\$50	\$50		
Dues and Subscriptions	\$172		\$172	
Equipment Purchase	\$1,567	\$1,567		
Equipment Rental	\$578	\$578		
Fundraising Ex	\$10,482			\$10,482
Garden	\$2,653	\$2,653		
Honorarium	\$350	\$350		
Licenses and Permits	\$145	\$85		\$60
Living Machine	\$113	\$113		
Miscellaneous	\$408	\$408		
Office Equipment	\$463	\$463		
Office Supplies	\$2,511	\$2,261		\$250
Printing and Reproduction	\$2,256	\$2,256		
Professional Fees	\$50	\$50		
Program Expense	\$1,716	\$1,716		
Special (Program) Events	\$1,749	\$1,749		
Staff Development	\$90		\$90	
Tel-a-communi	\$861	\$861		
Utilities	\$1,110	\$1,110		
Vol Rewards & Recog	\$206	\$206		
<b>Total Expense</b>	<b>\$29,023</b>	<b>\$17,969</b>	<b>\$262</b>	<b>\$10,792</b>



## STATEMENT 2

Form 990- (2002-2003) –  
Part III

Boxerwood Education Association, Inc  
EIN # 54-1937944

### Part III—Statement of Program Service Accomplishments

#### **What is the program's primary exempt purpose?**

Drawing upon the resources of Boxerwood Gardens, an arboretum and the horticultural legacy of Robert S. Munger, MD (1911-1988), Boxerwood Education Association, Inc (BEA) is a nonprofit organization whose mission is to educate and inspire people of all ages toward becoming successful and environmentally responsible stewards of the Earth. Our goals are to develop and administer year-round activities, presentation, exhibits, and special events designed

- 1 To encourage a closer relationship with one's self and nature
- 2 To create an awareness of the beauty, diversity, complexity and fragility of nature's systems and
- 3 To teach skills and behaviors needed to be effective stewards of the Earth

---

**Describe the services provided, the number of persons benefited, or other relevant information for each program title.**

#### **A. Organized and Administered the Operations of BEA**

What the activity achieved The organization of BEA enabled the nonprofit to operate in accordance with IRS regulations and its own by-laws to fulfill BEA's mission. With the guidance of the Board, the paid professional staff members and volunteers achieved the following

- 1 Executive Achievements
  - a) Established and administered a budget
  - b) Administered financial and fiduciary responsibilities
  - c) Oversaw public relations, hospitality, and communications
  - d) Negotiated contracts
  - e) Assured adherence to 501c(3) guidelines and BEA by-laws
  - f) Maintained office records
  - g) Coordinated schedules and calendars
  - h) Edited and published quarterly newsletter (Boxerwood Newsleaf)
  - i) Coordinated marketing and publicity efforts
  - j) Coordinated visitors program
- 2 Educational Achievements
  - a) Planned programs and activities in accordance with BEA mission and goals
  - b) Developed and initiated new preschool, high school, and watershed programs
  - c) Recruited and trained volunteer instructors and student interns
  - d) Purchased and managed educational resources
  - e) Implemented programs and activities
  - f) Evaluated programs and activities
- 3 Gardens and Physical Facilities Achievements

- a) Maintained and developed gardens and grounds needed for BEA
- b) Trained garden volunteers
- c) Purchased and managed materials, supplies, tools and equipment
- d) Maintained and developed physical facilities needed for BEA
- e) Increased accessibility to gardens and buildings for the physically handicapped
- f) Ameliorated human impact concerns

**B. Administered BEA's Volunteer Program:**

What the activity achieved

BEA's Volunteer Program enabled members of the community and college students to engage in BEA activities as supervised instructors, groundskeepers, and administrative assistants. The volunteers enabled the non-profit organization to accomplish its mission and goals in two ways

- a) volunteers enabled other participants to have learning experiences
- b) volunteers themselves had learning experiences that promoted their learning about local natural resources, environmental issues, gardening with nature, and ways to become successful and environmentally responsible stewards of the Earth

**1. Volunteers Who Served at Boxerwood Gardens**

	<u>Number who volunteered</u>
Adult Volunteers	28
Elementary Student Volunteers	15
Middle School Student Volunteers	15
High School Student Volunteers	47
College Student Volunteers Washington & Lee Univ	21
College Student Interns Ferrum College (1)	1

**Number who benefited = 127 individuals**

**2. Volunteers Who Served on Woods Creek Restoration Day in Woods Creek Park**

**Number who benefited = 105**

**(Unduplicated individuals [those who did not serve at Boxerwood Gardens] = 90)**

**Total number of volunteers who benefited = 217**

**C. Reached Out to the Public through BEA Publications and Outreach**

What the activity achieved

These activities enabled BEA to inform the public about its purpose and its activities and to educate members of BEA, others in the community, and tourists about gardening and environmental stewardship issues

1. **BEA published a total of 1800 copies of its multi-page quarterly newsletter** for its 235 member households and for the public at large, including information about gardening and environmental stewardship, BEA's calendar of activities, volunteer experiences at Boxerwood, and achievements of the nonprofit organization
2. **BEA mailed 350 moon calendars** to its members and volunteers
3. **BEA completely reconfigured and maintained its website** at [www.boxerwood.org](http://www.boxerwood.org)
4. **Presented information about BEA at booths** at July 4 Balloon Rally, Rockbridge Community Festival, and the Home-Business Expo

**Total number of BEA members who benefited = 235 households (1 to 6 individuals/household)**  
**Also, innumerable members of the general public benefited.**

#### **D. Provided Environmental Education Programs for Preschool Children**

What the activities achieved

1. **Preschool groups visited Boxerwood** for environmental activities

3 Head Start programs + 1 other pre-school = 4 pre-school groups

**Number of children/adult chaperones who benefited = 77**

2. **Seven (7) pre-school programs newly developed by BEA** and offered to local children

**Number of children/adult chaperones who benefited from 7 programs = 81**

**Total number of children/adult chaperones who benefited = 158**

#### **E. Provided Environmental Education Programs for Elementary School Children**

1. **Environmental Education for Elementary School Students**

Seven local schools made a total of 160 class visits to Boxerwood Gardens for environmental education (representing 3,020 entrances) BEA lesson plans were designed to meet Virginia's State Department of Education science Standards of Learning (SOLs), with a particular emphasis on watershed topics, through garden experiences. Thus, the Boxerwood curriculum was an integral part of the school's curriculum. Students studied nature at a level appropriate to their grade in school (K-5) under the following areas assigned to science SOLs

- a) Scientific Investigation, Reasoning, and Logic
- b) Life Processes
- c) Interrelationships in Earth/Space Systems
- d) Earth Patterns, Cycles, and Change
- e) Living Systems
- f) Force, Motion, and Energy
- g) Natural Resources and Conservation Practices

<u>Local Elementary Schools Served</u>	<u># Class Visits</u>	<u># Who Benefited</u> (students, teachers, parent chaperones)
Central Elementary	106	302
Effinger Elementary	4	64
Enderly Heights	12	54
Fairfield Elementary	12	77
Kling Elementary	8	41
Mountain View Elementary	6	69
Waddell Elementary	12	63
<b>Total number of class visits =</b>	<b>160</b>	
<b>Total number of individual entrances =</b>	<b>3,020</b>	
<b>Total number unduplicated who benefited =</b>	<b>670 individuals</b>	

**2. Watershed Discovery Weekend: From Boxerwood Gardens to the Maury River**  
 BEA created and administered two three-day residential learning experiences for local 4<sup>th</sup> grade students (representing 7 area schools) and their Adult Partners (parent, grandparent, step-parent, sister, friend, college student buddy)  
 October Program = 11 4th graders and 11 Adult Partners  
 April Program = 10 4th graders and 10 Adult Partners  
**Number who directly benefited = 21 4th graders and 21 Adult Partners (Total = 42)**  
 Further, all participating 4<sup>th</sup> graders were required to teach a watershed lesson to their 4<sup>th</sup> grade class or another community group, therefore  
**Number who indirectly benefited = est. 400 individuals**

**3. Outreach Watershed Education: Provided to Children**  
 BEA provided watershed education to local 4<sup>th</sup> graders in their classrooms (15 classroom visits)  
**Number who benefited = 110 students and 6 teachers**

**4. Outreach Watershed Education: Provided by Children**  
 BEA-educated 4<sup>th</sup> and 5<sup>th</sup> graders provided watershed education to the public as Assistant Guides on Woods Creek Restoration Day and at the Lexington Farmer's Market  
**Number who benefited = 23 students**

**5. Field Trips to the Chesapeake Bay**  
 BEA co-sponsored with Maury River Middle School two 3-day field trips (in October and April) to Smith Island for hands-on watershed and environmental programs offered by the Chesapeake Bay Foundation  
**Number who benefited = 48 5th and 6<sup>th</sup> grade students and 6 adults**

**6. Christmas Activities at Boxerwood**  
 BEA offered local children the opportunity to make wreaths of collected plant materials, decorate Christmas cookies and to sled on its hills  
**Number who benefited = 50 children**

**7. Garden Visit for Home-Schooled Children**

BEA hosted a garden visit for local home-schooled children and their parent-teachers

**Number who benefited = 40 children and 25 adults**

**8. Girl Scouts at Boxerwood**

BEA planned and led birding and other environmental activities for a Girl Scout Troop (overnight) and a Brownie Troop (after school)

**Number who benefited = 21 children and 3 troop leaders**

**9. Birding Classes for Children**

BEA co-administered (with the local chapter of the Sierra Club) a two birding classes after school for elementary-aged children and their parents

**Number who benefited = 8 children and 5 adults**

**10. Nature Detectives Day Camp in June**

BEA administered a week-long day camp program called "Nature Detectives" in June for children in grades K-4 BEA trained and supervised junior counselors in grades 5, 6, and 7

**Number who benefited = 42 campers and 12 junior counselors**

**Total number unduplicated children who benefited = 835**

**F. Mentored Maury River Middle School Students**

What the activity achieved

**1. Environmental Education Mentorship**

The MRMS Mentor Program allowed two groups of middle schoolers (gifted students in grades 6 and 7) to work with a professional environmental educator, BEA's Education Steward, at Boxerwood Gardens throughout the school year in order to develop their teaching skills They helped prepare and teach nature lessons to elementary-aged students The 7<sup>th</sup> grade mentees spent a night at Boxerwood to participate in teambuilding activities

**Number who benefited = 13 middle school student mentees (average 50 hrs. of service each)**

**2. Watershed Teaching Opportunity**

BEA's Education Steward met with a MRMS science class to prepare them to teach 2 classes of first graders about the local watershed and related environmental topics Then the 6<sup>th</sup> grade class came to Boxerwood to conduct their lessons with 1<sup>st</sup> graders for an entire school day

**Number who benefited = 23 middle school students (and 44 first graders + 2 1<sup>st</sup> grade teachers)**

**Total number of middle school students who benefited = 36**

### **G. Provided Service Opportunities for High School Students**

#### What the activity achieved

##### **1. Teen Adventure**

In the summer, BEA hosted three groups of Quaker teens (who camped at Boxerwood for 2 nights) and supervised their 8 hours of volunteer work in the garden

**Number who benefited = 44 high school students**

##### **2. Community Service**

BEA supervised high school students' court-ordered community service at Boxerwood Gardens

**Number who benefited = 3 high school students**

**Total number of high school students who benefited = 47 students**

### **H. Provided Educational Opportunities for College and University Students**

#### What the activity achieved

BEA supervised volunteer and educational activities for college students from Washington and Lee University (256), University of Virginia (1), Ferrum College (1), and Virginia Western Community College (40) For these students, BEA

1 Supervised volunteer activities and one (1) full-time internship related to BEA's mission (maintenance and development of the Garden, environmental education, and program administration)

**Number who benefited = 22**

2 Led garden tour for community college student group

**Number who benefited = 40**

3 Hosted college freshmen for an overnight camp-out at Boxerwood during orientation week

**Number who benefited = 92**

4 Hosted college resident hall advisors for a dinner meeting at Boxerwood Gardens

**Number who benefited = 55**

5 Hosted two graduation parties for Boxerwood volunteers (W&L students)

**Number who benefited = 100**

**Total number unduplicated who benefited = 298 college students**

## **I. Offered Adult Continuing Education**

### What the activity achieved

To offer adults horticultural and environmental education, BEA

1 **Opened Boxerwood Gardens to the public** for self-guided walkabouts from March through November, Tuesday through Sunday from 9 00 a m until 4 00 p m , extended hours to 10 00 p m on full moon nights

**Number who benefited = 750 (approx)** (visitation down due to exceptionally wet spring)

2 Conducted **educational garden tours** for 3 garden clubs, 2 Master Gardener groups, 1 senior citizen group

**Number who benefited = 192**

3 Conducted **gardening skills workshops and seasonal activities** related to gardens and nature, including Evergreen Pruning Workshop, Wreath-making Workshop, Container Gardening, Gardening for Wildlife, Digging and Dividing Perennials

**Number who benefited = 80**

4 Provided **outreach educational services** to local horticultural organizations Master Gardener class, Master Gardener plant sale, Garden Study Club, Farmer's Market

**Number who benefited = 150 (approx.)**

5 Assisted efforts of local horticulturalists to develop a local chapter of the **Virginia Native Plant Society** and hosted 9 meetings at Boxerwood Gardens

**Number who benefited = approx. 20 (at each of 9 meetings)**

6 **Offered facilities and grounds** to various local nonprofit groups including Montessori School (their fundraiser), Yellow Brick Road Pre-School (their fundraiser), Urban and Community Forestry Program (meeting), Washington and Lee University English Department (meeting), Rockbridge Area Conservation Council (annual meeting), Quaker Friends (retreat), Fortmighly Club (dinner meeting), Organic Vegetable Coop (weekly food distribution site)

**Number who benefited = 350 (approx.)**

7 **Wrote educational articles and a brochure** regarding horticultural and environmental topics for publication in local newspapers, BEA's website, and the member newsletter (see C. above) and distribution on Woods Creek Restoration Day

**Number who benefited = 500 +**

8 Provided community-building **activities for BEA's adult members**, including a "Fireworks on the Hill," a fall "Evening Under the Stars" with the presentation of 2 Stewards of the Earth Awards, and two spring "Crab Parties" at Boxerwood Gardens

**Number who benefited = 175 (approx.)**

9 Offered a **volunteer appreciation supper** at the end of the fall and spring seasons

**Number who benefited = 37**

**Total number unduplicated who benefited = 2000+ (approx.)**

## **J. Offered Educational Opportunities for People of All Ages**

### What the activity achieved

For this activity, BEA

1 Worked with the City of Lexington to plan and administer “**Woods Creek Restoration Day**” (on Arbor Day), including citizens’ watershed conservation education and citizen participation in plant care of 3000 native trees and shrubs

**Number who benefited = 105 community volunteers**

2 Provided a “**Fall Festival**” open free of charge to the community, featuring cider-making, treasure hunts, and nature games

**Number who benefited = 100**

3 Conducted an official **Christmas Bird Count** for the Audubon Society

**Number who benefited = unavailable**

4 Applied for and received designation as an official site on the “**Virginia Birding and Wildlife Trail**” (designation made by the Virginia Dept of Game and Inland Fisheries)

**Number who benefited = current and future garden visitors**

5 Developed **four new learning stations** for self-guided instruction in the garden including Pine Forest/Biodiversity, Pioneer Forest, Water Quality, Animal Tracks

**Number who benefited = current and future students and garden visitors**

6 Continued **improving trails to increase accessibility** for elderly & handicapped

**Number who benefited = current and future students and garden visitors**

7 Invited the public to visit Boxerwood Gardens on **Mother’s Day** free of charge

**Number who benefited = 100**

8 Hosted 4 weddings and 4 birthday parties at Boxerwood Gardens

**Number who benefited = 195**

9 Participated in a “**BioBlitz**,” a native plant count at Douthat State Park

**Number who benefited = unavailable**

**Total number who benefited = 500**

## **K. Participated In and Encouraged Professional Development Activities**

### What the activity achieved

For this activity, BEA

1 Offered a one-day National Wildlife Federation workshop “**Discovering Habitats**”

**Number who benefited (3 BEA staff members, 1 BEA intern, 7 BEA volunteers + 3 other educators) = 14**

2 Offered a 5-day teacher training program with the Chesapeake Bay Foundation

3 BEA’s Garden Steward attended the International Society of Arboriculture in Seattle



- 4 BEA's Executive Steward attended two local United Way-sponsored workshops for nonprofit organization managers
- 5 BEA's Garden Steward attended VMI's Environment Virginia Conference
- 6 BEA's Education Steward attended the regional meeting of the American Society of Arboriculturalists

**L. ADDENDA:**

1 **Partnered with RACC** (Rockbridge Area Conservation Council) in the 9th Annual Rockbridge Community Cleanup Day, March 29--served on the planning committee, recruited volunteers to clean up litter on roadsides and an illegal dump site

Number benefiting = approx 400 participants and the whole community

**2. Awards**

- The City of Lexington receive the "Gold Leaf Award" from the International Society of Arborists for the first WCRDay which BEA co-sponsored,
- RACC "Land Use Award" for BEA for the same,
- BEA Ed Steward "Steward of the Earth Award"

# STATEMENT 4

Board of Trustees Employees

Boxenwood Education Association, Inc  
54-1937944

990-2002

(A) Name & Address	(B) Title and average hours per week devoted to position	(C) Compensation (if not paid enter -0-)	(D) Contributions to employee benefits plans & deferred compensation	(E) Expense account and other allowances
<b>Board of Trustees:</b>				
Frank A. Parsons 15 Whitmore Street, Lexington, Virginia 24450	Board President 2	\$ - 0 -	\$ -	\$ -
Kit Huffman 1409 Ross Road, Lexington, VA 24450	Board, V-President 2	\$ - 0 -	\$ -	\$ -
Anice Machado 410 Reid Street, Lexington, VA 24450	Board, Sec'y/Treas 2	\$ - 0 -	\$ -	\$ -
Gail Barger 715 Plunkett Street, Lexington VA 24450	Board, Director 2	\$ - 0 -	\$ -	\$ -
Becky Hill 10 Sixty West, Lexington, VA 24450	Board, Director 2	\$ - 0 -	\$ -	\$ -
Larry Mann 5 West Washington St., Lexington, VA 24450	Board, Director 2	\$ - 0 -	\$ -	\$ -
Anne McThema 114 Lee Avenue, Lexington, VA 24450	Board, Director 2	\$ - 0 -	\$ -	\$ -
Paul G. Leonhard 645 MacCurdy Lane, Rockbridge Baths VA 24473	Board Director 2	\$ - 0 -	\$ -	\$ -
Molly Beyer 268 Sky Farm Lane, Buena Vista, VA 24416	Board, Director 2	\$ - 0 -	\$ -	\$ -
Kara Harbert P O Box 4575, Lexington, VA 24450	Board Director 2	\$ - 0 -	\$ -	\$ -
<b>Employees</b>				
Hunter Mohng 963 Ross Road, Lexington, VA 24450	Execuive Steward 20+	\$ 17,997.99	\$ -	\$ -
Karen R. Bailey 963 Ross Road, Lexington VA 24450	Garden Steward 20+	\$ 17,747.83	\$ -	\$ -
Mollie Messmer 49 Far Side Lane, Lexington, VA 24450	Education Steward 20+	\$ 18,925.82	\$ -	\$ -
Adam B. McNeil 962 Linden Ave., Buena Vista, VA 24416	Camp Counselor 40+ <i>1406</i>	\$ 392.45	\$ -	\$ -
Ladonna B. Clarke 57 Queens Court Newport News, VA 23606	Intern 40+	\$ 7,138.25	\$ -	\$ -

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07/15/03

**Boxerwood Education Association**  
**Payroll Summary**  
 July 2002 through June 2003

	Messimer, Mollie J	Mohring, Hunter S	TOTAL
<b>Employee Wages, Taxes and Adjustments</b>			
<b>Gross Pay</b>			
ABM (Intern)	0 00	0 00	392 45
BC (Intern)	0 00	0 00	6,761 00
HM	0 00	16,377 77	16,377 77
Hourly Wage	0 00	1,620 21	3,172 01
KB	0 00	0 00	16,545 63
MJM	18 925 82	0 00	18,925 82
Adjustment	0 00	0 01	0 01
reimburse+	0 00	0 00	27 65
<b>Total Gross Pay</b>	<u>18 925 82</u>	<u>17,997 99</u>	<u>62,202 34</u>
<b>Adjusted Gross Pay</b>	18 925 82	17,997 99	62,202 34
<b>Taxes Withheld</b>			
Federal Withholding	-1,594 00	-2,000 00	-6,259 00
Medicare Employee	-274 42	-260 97	-901 52
Social Security Employee	-1,173 41	-1,115 88	-3,854 84
VA - Withholding	-628 00	-642 00	-2,129 00
<b>Total Taxes Withheld</b>	<u>-3,669 83</u>	<u>-4,018 85</u>	<u>-13,144 36</u>
<b>Deductions from Net Pay</b>			
Housing Costs (week)	0 00	0 00	-100 00
<b>Total Deductions from Net Pay</b>	<u>0 00</u>	<u>0 00</u>	<u>-100 00</u>
<b>Net Pay</b>	<u><u>15,255 99</u></u>	<u><u>13,979 14</u></u>	<u><u>48,957 98</u></u>
<b>Employer Taxes and Contributions</b>			
Medicare Company	274 42	260 97	901 52
Social Security Company	1,173 41	1,115 88	3,854 84
VA - Unemployment Company	0 00	0 00	0 00
<b>Total Employer Taxes and Contributions</b>	<u><u>1,447 83</u></u>	<u><u>1,376 85</u></u>	<u><u>4,756 36</u></u>

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07/15/03

**Boxerwood Education Association  
Payroll Summary  
July 2002 through June 2003**

*STAFF Payroll  
02-03*

	<u>Bailey, Karen R</u>	<u>Clarke, Ladonna B</u>	<u>McNeil, Adam B</u>
<b>Employee Wages, Taxes and Adjustments</b>			
<b>Gross Pay</b>			
ABM (Intern)	0 00	0 00	392 45
BC (Intern)	0 00	6,761 00	0 00
HM	0 00	0 00	0 00
Hourly Wage	1 202 20	349 60	0 00
KB	16,545 63	0 00	0 00
MJM	0 00	0 00	0 00
Addjstment reimburse+	0 00	0 00	0 00
	0 00	27 65	0 00
<b>Total Gross Pay</b>	<u>17,747 83</u>	<u>7,138 25</u>	<u>392 45</u>
<b>Adjusted Gross Pay</b>	17,747 83	7,138 25	392 45
<b>Taxes Withheld</b>			
Federal Withholding	-1,963 00	-702 00	0 00
Medicare Employee	-257 34	-103 10	-5 69
Social Security Employee	-1,100 36	-440 86	-24 33
VA - Withholding	-634 00	-225 00	0 00
<b>Total Taxes Withheld</b>	<u>-3,954 70</u>	<u>-1,470 96</u>	<u>-30 02</u>
<b>Deductions from Net Pay</b>			
Housing Costs (week)	0 00	-100 00	0 00
<b>Total Deductions from Net Pay</b>	<u>0 00</u>	<u>-100 00</u>	<u>0 00</u>
<b>Net Pay</b>	<u><u>13,793 13</u></u>	<u><u>5,567 29</u></u>	<u><u>362 43</u></u>
<b>Employer Taxes and Contributions</b>			
Medicare Company	257 34	103 10	5 69
Social Security Company	1 100 36	440 86	24 33
VA - Unemployment Company	0 00	0 00	0 00
<b>Total Employer Taxes and Contributions</b>	<u><u>1,357 70</u></u>	<u><u>543 96</u></u>	<u><u>30 02</u></u>

STATEMENT #5

FORM 990, PART VIII RELATIONSHIP OF ACTIVITIES

<u>Line No</u>	<u>DESCRIPTION</u>
93A	IDLE FACILITIES RENTED FOR REVENUE TO SUPPORT PROGRAM
101	FEES CHARGED FOR USE OF FACILITY FOR WEDDINGS AND OTHER SPECIAL EVENTS