



# 2014 Annual Report

UTAH  
NONPROFITS  
ASSOCIATION



# From The CEO

Dear UNA Members,

This report provides a summary of our accomplishments in 2014 using our mission and goals as a rubric for evaluation. As we move forward, it is important to remember our purpose and relevance in the community. UNA is the umbrella membership association of nonprofit organizations in Utah. Incorporated in 1990, our 2014 membership includes over 700 nonprofit organizations, businesses and individuals state-wide. Our goals, programs and actions are guided by our vision, mission and core values of: integrity, accountability, respect and excellence. UNA strives to provide its members and partners the opportunity to engage in meaningful and dynamic relationships. In order to achieve this, UNA and its board drafted a three year strategic plan to guide the organization's growth (2013-2016).

UNA has made great progress due in large part to the dedication of our team members, volunteers, the engagement of our board members, the investment of our sponsors and donors and especially the enthusiasm and involvement of our members. Looking back helps us to celebrate the milestones we have reached and strive to reach those that still lie ahead with renewed energy. We hope that this summary of UNA's work will encourage your deeper involvement with UNA as we work to unify, strengthen, elevate and sustain one another to better serve our communities throughout Utah.

Warm Regards,



Chris Bray M.A. C.P.M.  
Chief Executive Officer

CEO Chris Bray speaks at UNA's  
2014 Annual Conference on  
September 19th 2014.  
Photo: Matt Barr.



# 2014 Highlights & Accomplishments



UNA ended 2014  
with **734 Members**



**4%** increase  
in membership



**88% retention**  
demonstrating value  
of our services &  
member satisfaction



Conference  
Attendance  
**375 people**



**83% of conference**  
attendees rated  
their satisfaction  
"above average"  
or "extraordinary!"



Launched a **training calendar**  
to provide a "one-stop-shop"  
for nonprofit training in Utah



**\$100,000 grant from  
Goldman Sachs Bank**  
to provide a data map  
of refugee service  
providers serving the  
community



Initiated two steering  
committees which  
resulted in a new  
**nonprofit credential  
program in 2015**



Contributed a chapter  
on the economic impact  
of the nonprofit sector to  
the **2015 Utah Economic  
Outlook: Economic  
Report to the Governor**

# Mission, Vision & Goals

**Our Vision:** UNA envisions strong and vibrant communities for all.

**Our Mission:** to unify, strengthen, and elevate the nonprofit community in Utah.

**Our Goals:**

**Unify:** To be the connector of nonprofits and communities in the delivery of programs and services.

**Strengthen:** To be the portal of nonprofit expertise, education, benefits and services.

**Elevate:** To be the voice and promote the essential value of the nonprofit community.



Brad Peterson, UNA Chair  
2014 Annual Conference on  
September 19th 2014.

# Unify



*To facilitate the connections between nonprofit organizations and the communities for which they provide programs and services. In 2014 we achieved this by:*

## *Highlights:*

- Hosting 9 networking events for nonprofit professionals.
- Securing a \$100,000 grant from Goldman Sachs Bank USA to support nonprofits serving the refugee community by conducting a refugee services analysis.
- Collaborated on services with the Department of Arts & Museums, Volunteer Commission, Human Services, Chamber of Commerce's, Utah Society of Fund Raisers and Grant Professionals Association.
- Represented the nonprofit sector's interest by providing input to the Federal Office of Management and Budget on grant processes.

# Strengthen

## *Highlights:*

- Developed a framework for improved training and credential program. The pilot will begin in 2015 with an anticipated launch in 2016.
- Delivered over 50 trainings in Utah.
- Formed reciprocal agreements with Utah Museum Association, Utah Society of Fund Raisers & Grant Professionals Association.
- Recorded and put several training videos online and partnered with Firespring to provide webinars. This increased access to trainings for nonprofit members in Southern Utah and remote communities, increasing UNA's statewide reach. It also resulted in expanding the trainings available to our members on difference topics at a low price.
- Collaborated with Alliance for Nevada Nonprofits to provide digital media (launch 2015).



# Elevate

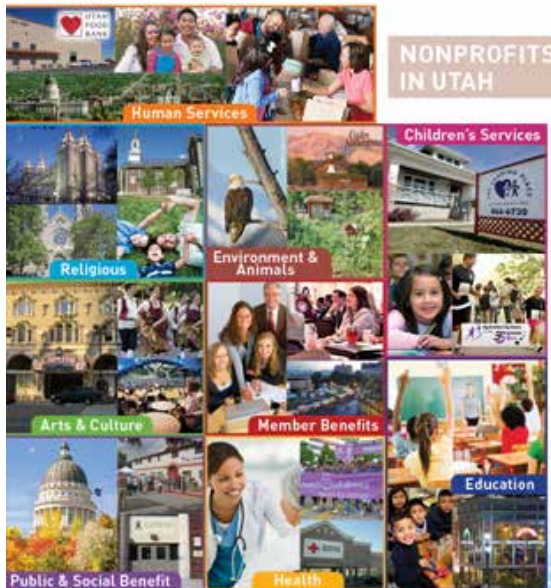


## *Highlights:*

- UNA was actively involved with and influential in several Public Policy initiatives important to the nonprofit sector including Utah H.B. 283, advocating for the development of national and local document vaults, the implementation of street light fees in Salt Lake City, the America Gives More Act, work with the Federal Office of Management and Budget, and sought amendments to and clarifications of the Charitable Solicitation Act in Utah.
- Invited nonprofits to attend “Pay for Success” informational meetings with Salt Lake County.
- Provided several articles, reports and data sheets about the NP sector (Governors Report to Legislature, Utah Bar Association nonprofit committee, Salary Survey).
- UNA board expanded to include representatives from the government and private sector.

# 2015 Priorities

- Complete development and conduct the pilot classes of the Board and Organizational Credential Program.
- Find community champions to build professional development capacity for nonprofits serving in areas outside the Wasatch front.
- Continue to build strong public policy presence in the community.
- Successfully complete refugee services assessment and grant requirements in 2015.
- Survey UNA's members to assess nonprofit community needs and work to maintain and expand UNA's relevance.





# 2014 Board Members

Chair: Brad Pederson, American Express

Vice and Governance Chair: Kasandra VerBruggen,  
Spy Hop – Governance Chair

Past Chair: Gretchen Dietrich, Utah Museum of Fine  
Arts

Treasurer: Richard Scoresby, CBIZ/Mayer, Hoffman and  
McCann

Secretary and Board Engagement: Ginette Bott, Utah  
Food Bank

Member At Large: Roland Radack, Deseret  
Management Corporation

Member at Large: Steve Ott, University of Utah

Legal: Brent Andrewsen, Kirton McConkie

Conference Chair: Kathleen Pitcher Tobey, Cambia  
Health Foundation

Professional Development Chair: Cathy Barnhart,  
English Skills Learning Center

Organizational Credential Chair: Nichol Bourdeaux, Salt  
Lake City Corporation

Outcomes Chair: Kristy Chambers, 4th Street Clinic

Networking Chair: Jen Levy

Communications Chair: Poonam Kumar, SLC Mayor's  
Office

Membership Co-Chair: Stephen Lyon, Mountainland  
Foundation

Membership Co-Chair: Jerilyn Stowe, United Way of  
Salt Lake

Gloria Wilkinson, Zions Bank

Cyndy Miller, CPA advisor

Diana George, Wells Fargo

Diana Major Spencer, Casino Star Theatre Foundation

# Staff & Volunteers

Chris Bray, Chief Executive Officer  
Patty Shreve, Operations Manager  
Dawn McLain, Southern Utah Coordinator  
Mary Migliorelli, Professional Development Manager  
Brooke Dimond, Professional Development Coordinator  
Sarah Walter, Graduate Assistant, University of Utah,  
Masters of Public Administration  
April Ricks, Graduate Assistant, University of Utah,  
Masters of Public Administration  
Suzanne Mullet, Conference Coordinator  
Henry Wythe, Training Calendar Volunteer  
Collin Bess, Public Policy Intern  
Emilee Bray, Conference Intern  
Angie Bradshaw, Membership Intern



Philanthropy Day, 2014 Left to Right: Collin Bess, Brooke Dimond, Chris Bray, Patty Shreve, Sarah Walter.



## Committee Volunteers

**Southern Utah Planning and Organizing:** Mike Gburski, Raquel Adams, Carol Golichnik, Donna Howell, Billy Wilkin, Brad Hafen, Andrew Peterson, Ashley Gilreath, Amy Brinkerhoff, & Lil Barron

**Conference:** Kathleen Pitcher Tobey- Chair & UNA Board member, Janet Wade, Janee Trujillo, Wendi Hassan, Vicki Bourns, Blair Hodson, Brandon Schembr, Chris Hootman, Dave Jones, Diana George, Mike Gburski, Doug Hansen, Emily Higbee, Jason Bowcutt, Katherine Fife, Karen Wiley, LaDawn Stoddard, Heather Smith, Mary Richardson, Soren Simonsen, Trisha Worthington, Samantha Sedivec, Peggy Cain, Susan Smith, Megan VanFrank, Ann Mackin, Amber Neilson, Volunteers: Natalie Green, Jeremy Cleek, Milo Quiroz, Ji Won Chang, Jared Hurdman, Geoff Doiron, Afton January , Nicole Batt, Julie Thomas, & Blake Peterson

**Membership:** Steve Lyon and Jerilyn Stowe- Co-Chairs & UNA Board Members

**Nonprofit Organizational Credential Steering Committee:** Nichol Bourdeaux- Chair & UNA board member-Salt Lake City Corporation, Brad Pedersen- UNA board member & American Express, Gretchen Dietrich- UNA board member & Utah Museum of Fine Arts, Dianna Major Spencer- UNA board- Casino Star Theatre Foundation, Debbie Hardy- Intermountain Health Care, Greg Reid- Select Health, Kelly Bryson-Eide Bailey, Brent Andrewsen- Kirton McConkie, Thad Hall- U of U- MPA program, Nick Thiriot- U of U Economic Development, Dr. Jerry Salkowe- Quality Expert, Debra Hoyt- Questar, Rebecca Dutsen- United Way of Salt Lake, Ann Marie Thompson- Salt Lake Chamber of Commerce, Libby Blanchard- Community Foundation of Utah, Steve Peck- Discover Card, Ron Humphries- Community Volunteer Advocate, Dawn McLain- Southern Utah UNA networking coordinator, & Chris Bray- UNA

**Board Credential Steering Committee:** Carlene Walker- former Utah State Senator, Christine Arthur- Arthur & Jensen CPA's, Marsha Gilford- Kroger/ Smiths, Judy Kasten Bell- Davis Boys & Girls Clubs, Ashlee Burt- Springboard, Roland Radack- Deseret Management & UNA Board Member, Diana George- Wells Fargo & UNA Board Member, Gloria Wilkinson- Zions Bank & UNA Board Member, Craig Wagstaff- Questar, Shacey Petrovic- Clinical Innovations, LaDawn Stoddard- Utah Commission on Service & Volunteers, Garrett Rees- Microsoft, Jeffrey Woodworth- Stoel Rives, & Chris Bray-UNA

## 2014 Sponsors

**Keystone:** American Express, CIT Bank, Goldman Sachs Bank, & Morgan Stanley Bank N.A.

**Community:** Beehive Insurance, Daniels Fund, Utah Division of Arts & Museums, UServeUtah Utah Commission on Service & Volunteerism, George S. & Delores Doré Eccles Foundation, Emma Eccles Jones Foundation, Zions Bank, Questar, Larry H. & Gail Miller Family Foundation, Union Pacific, University of Utah Master of Public Administration, Lawrence T. & Janet T. Dee Foundation, Hafen Insurance & Team Nash

**Conference Sponsors:** Cambia Health Foundation, Intermountain Healthcare, SelectHealth, Morgan Stanley Bank, N.A ,Tanner, Arches Health Plan, Questar, Wells Fargo , UserveUtah Commission on Service & Volunteerism, Beehive Insurance, Eide Bailly, The Church of Jesus Christ of Latter-Day Saints Foundation, Smith's Food & Drug Stores, Zions Bank, Pathway Associates, Arthur & Jensen., Kirton McConkie, CBIZ/Mayer Hoffman McCann P.C., University of Utah Nonprofit Academy for Excellence, Third Sun.com, & Mediafast.



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Form 990 and Financial Review can be found online at the following address:  
<https://utahnonprofits.org/about-us/legal-documents>.