2019
ANNUAL REPORT
Good people doing good work for good causes.
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UNA Team

Kate Rubalcava
Chief Executive Officer

Jill Bennett
Director of Professional Development and Communications

Brandy Strand
Director of Operations

Alison Anderson
Program Support Coordinator

Collyn Mosquito
Public Policy Program Coordinator

Dawn McLain
Southern Utah Networking Coordinator
Leader Message

As I reflect on the past 12 months I am amazed at what UNA has been able to accomplish at all levels and among all of the various projects we have going on.

The UNA Board has been attentive and engaged since we launched Strategic Planning in the Spring of 2019. My staff have really excelled in assuring that our membership benefits match the needs of our members. Our training is timely, appropriate, and absolutely essential. Our communications are funny, intriguing, and inviting. And we have a more stable footing on the policy front, both at the State and Federal level. Our members have shown up for us. They have invested in membership to UNA, come to our training sessions and provided us valuable feedback. Our funding partners have stepped up and really shown us that they value the work we do and the impact we have in our nonprofit community and all Utahns.

It has all been so rewarding. UNA is a pillar in our community and an organization I am proud to lead. UNA is good people doing good work for good causes.

Kate Rubalcava, M.Ed.
Chief Executive Officer

Serving as the Board Chair this past year has been both exciting and meaningful. I am so grateful to the UNA board. This prestigious group of volunteers provides insights and wise advice in advancing the mission and work of UNA. I am particularly thankful for their efforts in preparing the upcoming Strategic Plan. This document, will help guide UNA through 2022.

I also want to recognize Kate’s leadership and the important work of the UNA staff. UNA provides invaluable resources to the nonprofit community through trainings, workshops, the annual conference, and other offerings. By working and networking together, UNA helps unite our diverse member organizations through our many shared commonalities and experiences. The dedication and commitment of our staff supports this work and makes it possible.

Thank you to our members. Your engagement with UNA expresses your belief in the value of strengthening and elevating the nonprofit sector; and in the power of the impact you have on our statewide communities.

George Lindsey
UNA Board Chair
About Us

Since 1990, Utah Nonprofits Association (UNA) has been unifying, strengthening, and elevating Utah’s nonprofit sector. Each year, thousands of Utah’s board members, volunteers, and professional staff turn to UNA for resources to help them better serve communities.

Mission

Unify, strengthen, and elevate Utah’s nonprofits.

Vision

Promote strong and vibrant communities for all of Utah.

This report shares our impact from January 1, 2019 to December 31, 2019

2019 Highlights

- 29 BADGES
- 1,377 MEMBERS INSURED
- 29 EVENTS & TRAININGS
- 2,793 INDIVIDUALS REACHED

"Managing and growing a successful nonprofit is hard work. While it starts with passion, the day to day requires a nuanced understanding of employment law, public policy, ethical business practice, and a whole lot more.

The Utah Nonprofits Association makes navigating all these complexities not only digestible, but fun! They are a small but mighty team of experts who are there to ensure that Utah’s nonprofit community is thriving.

Mara Haight
Executive Director
Rape Recovery Center

Team UNA celebrates
Collyn’s first day
L-R Back: Jill, Alison, Collyn
L-R Front: Kate and Brandy
**Membership Report**

UNA membership represents nonprofit organizations, individuals and businesses. In 2019, membership included 571 nonprofits, 63 supporting individuals and 64 business partners. Nonprofit member demographics and participation include:

- Member nonprofits represent all charitable cause areas with the majority from human services, arts/culture, and education.

- The majority are small nonprofits with 62% reporting less than $500,000 in operating costs.

- UNA provides statewide support to nonprofits with the majority of members in Salt Lake County.

**Cause Area**

<table>
<thead>
<tr>
<th>Cause Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUMAN SERVICES</td>
<td>24%</td>
</tr>
<tr>
<td>ARTS/CULTURE</td>
<td>20%</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>17%</td>
</tr>
<tr>
<td>PUBLIC/SOCIETAL BENEFIT</td>
<td>10%</td>
</tr>
<tr>
<td>OTHER</td>
<td>10%</td>
</tr>
<tr>
<td>HEALTH</td>
<td>8%</td>
</tr>
<tr>
<td>ENVIRONMENT</td>
<td>8%</td>
</tr>
</tbody>
</table>

Less than 1% from Mutual/Member, Religion, International/Foreign Affairs

**Geographic Area**

- **SALT LAKE** - 63%
- **SUMMIT** - 7%
- **OTHER** - 6%
- **UTAH** - 5%
- **WEBER** - 5%
- **WASHINGTON** - 4%

Less than 2% from Box Elder, Carbon, Davis, Grand, Iron, Kane, San Juan, Sanpete, Tooele and Wayne Counties.

**Nonprofit Size**

(based on operating costs)

<table>
<thead>
<tr>
<th>Size Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$25K</td>
<td>20%</td>
</tr>
<tr>
<td>$25K - $50K</td>
<td>7%</td>
</tr>
<tr>
<td>$50K - $200K</td>
<td>18%</td>
</tr>
<tr>
<td>$200K - $500K</td>
<td>17%</td>
</tr>
<tr>
<td>$500K - 1 MIL</td>
<td>14%</td>
</tr>
<tr>
<td>1 MIL - 5 MIL</td>
<td>17%</td>
</tr>
<tr>
<td>&gt;5 MIL</td>
<td>8%</td>
</tr>
</tbody>
</table>
Program Impact

UNA elevates nonprofits by helping them grow and achieve greater mission impact. We help nonprofits fully incorporate best practices, grow collaborations, and improve capacity through our member benefits, trainings, workshops, and events.

Health Insurance Benefits

UNA offers members low-cost, pooled health insurance benefits. During 2019, 59 nonprofit organizations participated with 1,377 individuals receiving insurance coverage.

2019 Health Insurance

1,377 INDIVIDUALS

59 ORGANIZATIONS
Events & Professional Development

UNA facilitates top-notch training, offers cost-effective resources, and connects the community to a strong and vibrant nonprofit sector.

The 29 networking, peer-to-peer learning, and workshops in 2019 boasted 367 professionals from 214 nonprofits around the state. Major events include Utah Philanthropy Day, UNA Nonprofit Conference, and Nonprofit Day on the Hill.

UNA Annual Conference

Stronger nonprofits mean a better, more healthy and vibrant community. This year’s UNA Nonprofit Conference, Connect NOW! brought over 400 people together. The conference featured a full day of learning, networking, and giveaways with a keynote speaker, 24 breakout sessions, and 35 exhibit hall vendors.

The conference celebrates and unites Utah’s nonprofit community and provides practical solutions, personal connections, and new perspectives.

<table>
<thead>
<tr>
<th>2019 Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>29 EVENTS</td>
</tr>
<tr>
<td>306 INDIVIDUALS</td>
</tr>
<tr>
<td>367 ENROLLED</td>
</tr>
<tr>
<td>214 ORGANIZATIONS</td>
</tr>
</tbody>
</table>
Utah Philanthropy Day
Utah Philanthropy Day is a special day set aside for the purpose of recognizing philanthropy and honoring those individuals, businesses, and organizations who are active in the philanthropic community. This day is celebrated across the country, and in Utah, UNA hosts Utah Philanthropy Day in partnership with UServeUtah and the Association of Fundraising Professionals Utah (AFP Utah).

Since 1999, the group has joined together to honor Utah’s philanthropists giving time, talents, and resources. Event proceeds are split evenly between UNA and AFP Utah in support of and to sustain mission services for the organizations. In 2019, the event hosted 954 attendees with 87 Heart and Hand Recipients honored.

UNA was proud to honor Peggy Green as Heart and Hand recipient for her dedication and service on the UNA Board of Directors and Southern Utah Committee.

The nonprofit world can be uncertain, overwhelming and also filled with excitement and joy. Our organization leans on the navigation of UNA and network of professionals to find a meaningful path, create effective advocacy and resources to stay true to our mission.

Peggy Green
Executive Director
Iron County Care and Share

2019 Utah Philanthropy Award Recipients

Dr. Dinesh Patel - Philanthropic Leadership Award
5 for the Fight Foundation - Foundation Spirit of Giving Award
doTERRA International - Corporate Spirit of Giving Award
Bob Dunn - Governor’s Career Humanitarian Leadership Award
Ben Amiel - Outstanding Young Volunteer Award
Elaine Ellis - Outstanding Volunteer Award
Jensie Anderson - Lt. Governor’s Public Service Award
Nonprofit Day On The Hill

Nonprofit Day on the Hill gathers nonprofit organizations at the Utah Capitol to educate and advocate for their respective causes. UNA organizes this event to support the education of policy makers on the breadth and depth of Utah’s nonprofit sector and to help nonprofit members gain skills and understanding on the importance of their voice in the policy making process. During 2019, 40 unique organizations participated in the event.

Below are links to the nonprofit chapter for the 2019 Economic Report to the Governor, which is authored by UNA, and the UNA 2019 Nonprofit Fact Sheet.

2019 Economic Report to the Governor (Nonprofit Chaper Only)
UNA 2019 Fact Sheet

“The guidance from the UNA staff made our meetings with our senators and representatives smooth and productive.

The support we received from Team UNA outside of the chambers was SUPER helpful and the pep talks were appreciated.

Nonprofit Day On The Hill Participant
**UNA Credential**

The Nonprofit Organizational Credential provides nonprofits a path to improve capacity in nine critical areas. In 2019, the program served 156 leaders from 92 nonprofits and awarded 29 badges of completion.

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**Total Badges Earned Since 2015**

<table>
<thead>
<tr>
<th>Category</th>
<th>Badges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advocacy &amp; Civic Engagement</td>
<td>11</td>
</tr>
<tr>
<td>Board Governance</td>
<td>9</td>
</tr>
<tr>
<td>Community Impact</td>
<td>3</td>
</tr>
<tr>
<td>Finance &amp; Legal</td>
<td>2</td>
</tr>
<tr>
<td>Fundraising &amp; Resource Dev</td>
<td>27</td>
</tr>
<tr>
<td>Human Resources &amp; Volunteer Mgt</td>
<td>8</td>
</tr>
<tr>
<td>Leadership &amp; Organizational Culture</td>
<td>10</td>
</tr>
<tr>
<td>Marketing &amp; Communication</td>
<td>21</td>
</tr>
<tr>
<td>Outcomes &amp; Evaluations</td>
<td>7</td>
</tr>
<tr>
<td>Volunteer Management</td>
<td>18</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>116</strong></td>
</tr>
</tbody>
</table>

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The Haven receiving recognition for being the first organization to receive the UNA Credential

UNA Credential participants learn state of the art information and meet amazing nonprofit professionals.
[UNA Credential] delivers a ton of information in a simplified, organized and easy to digest way. By providing templates and tools we can easily edit or adapt for our organization, the program helps any organization meet best practice standards.

2019 Participant
Key Supporters

Utah Nonprofits Association’s success is made possible through a growing group of financial supporters, community volunteers, nonprofit experts, business leaders, employees, and partners in service. Special thanks to our 2019 financial and in-kind supporters.

**Individual Donors**
- Alan and Jeanne Hall
- Brian Itliong
- Cathy Barnhart
- Cyndy Miller
- Don Gomes
- Elizabeth Weight
- George Lindsey
- Jordan Toone
- Kasandra Verbruggen
- Kristy Chambers
- Liz Dana
- Luis Garza
- Luke Deppermann
- Lydia LaSalle
- Mara Height
- Patty Shreve
- Paul Burnett
- Peggy Green
- Richard Scoresby
- Rob Harter
- Ruby Chou
- Shalaun Howell
- Shawn Newell
- Steve Beyers

**Membership**
- Beehive Insurance
- Daniels Fund
- Emma Eccles Jones
- Parr Brown Gee & Loveless
- Team Nash

**Nonprofit Conference**
- American Express
- Beehive Insurance
- Blip
- Comcast
- Community Counseling Service
- Data Intensive Science
- First Nonprofit
- Google
- Intermountain Healthcare
- Kirton McConkie
- Mark Miller Subaru
- Morgan Stanley
- Mountain America Credit Union
- Now CFO Utah
- Pathway Associates
- Regence Blue Cross Blue Shield
- The Church of Jesus Christ of Latter Day Saints
- UServeUtah
- Wells Fargo

**UNA Credential**
- American Express
- Dee Foundation
- Dominion Energy
- George Eccles Foundation
- Morgan Stanley
- The Church of Jesus Christ of Latter Day Saints
- Union Pacific

**In-Kind Partners**
- BW Productions
- Eide Bailly
- Kirton McConkie
- Mountain America Credit Union
- Roger Lager
- Third Sun
- UServeUtah
- Write It Up!
Board of Directors

**Executive Committee**

George Lindsey, Chair  
Utah Museum of Fine Arts

Dr. Rob Harter, Vice Chair  
Christian Center of Park City

Cathy Barnhart, Past Chair  
English Skills Learning Center

Steve Beyers, Secretary  
Executive Director  
Cystic Fibrosis Foundation

Princess Gutierrez, Treasurer  
Discovery Gateway

Laura Hadley  
Cystic Fibrosis Utah Idaho Chapter

Ed Roberson  
Journey Team

**Directors**

Brent Andrews  
Kirton McConkie

Bruce Bryner  
American Express

Paul Burnett  
Tanner and Co.

Kristy Chambers  
Columbus Community Center

Dr. Ruby Chou  
Mundi Project

Liz Dana  
Wabi Sabi

Luke Deppermann  
Kirton McConkie

Luis Garza  
Comunidades Unidas

Peggy Green  
Iron County Care and Share

Mara Haight  
Rape Recovery Center

Shalaun Howell  
Bountiful Peak

Lydia LaSalle  
Best Friends Animal Society SLC

Shawn Newell  
Industrial Supply Company

David Schmidt  
Pluralsight

Jordan Toone  
Parr Brown Gee & Loveless PC
Health Plan Committee
Joel Bingham
CTA Community Supports
Paul Burnett
Tanner and Co.
Kristy Chambers
Columbus Community Center
Gina Cornia
Utahns Against Hunger
Liz Dana
Wabi Sabi
Luke Deppermann
Kirton McConkie
John Gold
The Sharing Place
Jon Harriss
Regence Blue Cross Blue Shield
Amy Jenkins
Regence Blue Cross Blue Shield
Penny Nuttall
Root for Kids
Todd Valentine
Beehive Insurance
Kate Rubalcava
Utah Nonprofits Association
Nora Trinidad Scholle
YCWA Utah

UNA Strategic Planning Committee
Jill Bennett
Utah Nonprofits Association
Liz Dana
Wabi Sabi
Luis Garza
Comunidades Unidas
Laura Hadley
Cystic Fibrosis Foundation Utah Idaho
Lydia LaSalle
Best Friends Animal Society, SLC
Shawn Newell
Industrial Supply
Ed Roberson
Journey Team
David Schmidt
Plural Sight
Kate Rubalcava
Utah Nonprofits Association
Brandy Strand
Utah Nonprofits Association

UNA Conference Committee
Janet Wade, Chair
Easter Seals-Goodwill Northern
Rocky Mountain

Apollo Burgamy
Utah Department of Veterans and
Military Affairs
Julie DeLong
Pathway Associates
Isabel Gardett
International Academies of
Emergency Dispatch
Peggy Green
Iron County Care and Share
Varden Hadfield
Mountainland Technical College
Shalaun T. Howell
Shaw & Co.
Amanda Hughes
Boys & Girls Clubs of Greater Salt Lake
Jacob Johnson
UServeUtah
Saoio Manumaleuga Utu
University Neighborhood Partners
Dr. Ruby Chou
Mundi Project
Brent Uberty
BW Productions
Alison Anderson
Utah Nonprofits Association
Jill Bennett
Utah Nonprofits Association

UNA Southern Utah Committee
Raquel Adams
Root for Kids
Mike DeMille
Southern Utah Cares
Mike Gburski
JadeFire Development
Carol Golichnik
CG Nonprofit Solutions
Peggy Green
Iron County Care & Share
Martha Heuer
Three Corners Women’s
Giving Circle
Krista Longhurst
Habitat for Humanity of SW Utah
Donna MacBean
Neighborhood Connection
Dawn McLain
Utah Nonprofits Association
Jane Muller
Independent Consultant
Kayo Skandumas
Habitat for Humanity of SW Utah

Public Policy Committee
Steve Beyers
Counseling Centers of Utah
Gina Burrows
RISE
Brook Chidester
Utah Food Bank
Jayceen Craven Walker
Cyndy Miller
Susan Speirs
UACPA
Jordan Toone
Parr Brown Gee & Loveless PC
Rita Wright
Springville Arts Museum
Kate Rubalcava
Utah Nonprofits Association
Brandy Strand
Utah Nonprofits Association

Partners In Service
Cedar City Chamber
Cherry Creek Media
Dixie State University
Fordable Fundraising
National Council of Nonprofits
St. George Chamber
Southern Utah University
Starbucks Store #9933
Third Sun
Wabi Sabi
UNA is committed to financial accountability and transparency. Below is a summary of financial activity for the period ending 12/31/2018.

**REVENUE**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Contributions</td>
<td>$199,986</td>
<td>46%</td>
</tr>
<tr>
<td>Membership Dues</td>
<td>$134,186</td>
<td>31%</td>
</tr>
<tr>
<td>Program Service Income</td>
<td>$80,781</td>
<td>19%</td>
</tr>
<tr>
<td>In-Kind Contributions</td>
<td>$14,460</td>
<td>3%</td>
</tr>
<tr>
<td>Interest/Other</td>
<td>$2,532</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$431,945</strong></td>
<td></td>
</tr>
</tbody>
</table>

**EXPENSES**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>$280,441</td>
<td>76%</td>
</tr>
<tr>
<td>Administration</td>
<td>$79,160</td>
<td>3%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$12,030</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$371,631</strong></td>
<td></td>
</tr>
</tbody>
</table>

Review the detailed 2018 financial review and/or Form 990. [Financial Review](#) [Form 990](#)

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**I financially support UNA on a monthly basis because of their amazing training and networking opportunities for Utah’s nonprofits. UNA has a strong community presence that supports nonprofits large and small.**

Lydia LaSalle  
Executive Director SLC  
Best Friends Animal Society