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*Photos courtesy of our members.*
UNA champions and equips nonprofits to create sustainable futures for all Utahns. We are the advocate, voice, sustainer, preserver, and friend for every nonprofit in Utah. For over 30 years, we have supported nonprofits in their work to lift the lives of people throughout the state—helping thousands of organizations meet the challenges they face daily by providing them with cost-saving benefits and resources, professional development and training, and state and federal advocacy.

Our work enables nonprofits to focus their drive, energy, and passion on protecting and uplifting Utah’s people, wildlife, and natural environment and eco-systems. We are guided by our core values of inclusivity, learning, community, integrity, and humility. These values shape how we welcome and include our members and the community, hold ourselves accountable, and seek inclusive solutions.

We are the community of nonprofits. We are the leaders, staff, board members, and volunteers who tirelessly give our careers and time toward making Utah, and our world, a better place.

**MISSION**
To unify, strengthen, and elevate Utah’s nonprofits.

**VISION**
To promote strong and vibrant communities for all of Utah.
I feel very proud that UNA remains a steady and innovative resource for the Utah nonprofit community. It truly is remarkable what Team UNA has accomplished this year and it is evident that we do this work in partnership with all of you. We rely on our members to push us to look harder and to dig deeper for solutions. We rely on our funding and business partners to support us financially so that we can continue to achieve greatness. We rely on our Board of Directors to listen and guide thoughtfully. And as this organization’s chief executive I am heavily indebted to UNA’s staff. Without their partnership, innovation, guts, drive, professionalism, boldness, and quick resolve, none of this would be possible.

Here are some of my favorite milestones from this last year:

- UNA staff wrote the Nonprofit Chapter in the Economic Report to the Governor
- We hosted another successful virtual Conference
- With partners and an amazing broadcast team, Utah Philanthropy Day was broadcast statewide
- We continue to have record-breaking engagement and attendance in our UNA Credential
- Staff and Board continue to be committed to embedding race, equity, diversity, and inclusion (REDI) into everything we do
- We have updated our Standards of Ethics to reflect the latest and greatest concepts
- We have fully transitioned to a remote workforce
- All staff are now full time and make over $17.00 per/hour with full benefits

It is my hope that you see yourself and your mission reflected in this Annual Report. I am hopeful that our work continues to resonate with you. One truth is absolutely evident—UNA thrives because of you. With all the grace, love, and respect in the world—Thank You.

In community,

KATE RUBALCAVA, M.Ed.
CHIEF EXECUTIVE OFFICER
UTAH NONPROFITS ASSOCIATION
Socrates said, "The secret to change is to focus all your energy not on fighting the old, but on building the new."

The immensely talented team of professionals that guide the work of UNA led us into 2021 with a fresh focus to move forward, and an embrace of the unknown. Without missing a beat, the team continued to explore innovative pathways for the diverse nonprofit membership to continue to thrive, learn and serve their communities.

Serving our communities is what we do as nonprofit organizations and our UNA memberships are how we do it bigger and bolder. UNA provides unification, strength, and elevation of our missions and messages. With the support of UNA we illuminate needs in our communities and improve the quality of life for those we serve.

Serving our communities continues to be chock full of challenges and UNA makes it possible to reimagine and retool where needed. Leading out by moving remote, successfully adapting events and education via online delivery, and developing best practices for weaving the critical elements of race, equity, diversity, and inclusion into all facets of the organization. UNA is grit with heart and purpose.

I am grateful for the opportunity gifted to me to serve alongside leaders from a diverse fabric of nonprofits in our state. This collaboration of passion and expertise blends with the dedication of the UNA team and ensures every member is supported and has access to resources that allow organizations to flourish.

Thank you for being a UNA member and for allowing me to be a part of your successes.

Make it a great year. Be kind.

PEGGY GREEN
2021 UNA BOARD CHAIR
EXECUTIVE DIRECTOR
IRON COUNTY CARE AND SHARE
Nonprofits are vital to Utah—they are fundamental in building healthy and resilient communities and touch the lives of every Utahn in ways both seen and unseen. They provide critical services that contribute to economic stability while also filling the large gaps left by government and private enterprises—gaps which can leave people in need of essential services.

Despite a multitude of challenges facing nonprofits including a lack of funding, a global pandemic, and shortfalls in attracting and retaining staff, nonprofits are committed to fulfilling their missions. The passionate individuals that dedicate their time and careers to nonprofit missions are working harder, longer, and wearing more hats than ever to bring comfort, hope, food, shelter, healing, support, protection, inspiration, and education to the people of Utah.

When nonprofits need help in overcoming gaps in organizational capacity, or sometimes just need a little guidance or boost of moral support—we are here, ready to provide whatever assistance is needed. As the premier nonprofit membership organization in Utah, our mission is unique. We help nonprofits gain traction as they do the important work of moving our society forward—work that can only happen when nonprofits receive real, significant support.

The delivery of our mission falls into three categories: membership, professional development, and advocacy. We provide support through targeted training, educational resources, templates, professional service discounts, networking opportunities, insurance, employment connections, and more. We also serve as the fiscal sponsor for Utah Philanthropy Day, an annual event that honors the many philanthropists and volunteers in our community who selflessly give their time, talents, and financial resources to nonprofits.

UNA continues to grow and tailor its program offerings to better serve the needs of the nonprofit community. The transition of programming and services to online platforms, adopted in response to the COVID-19 pandemic yielded unexpected benefits. We saw increases in program registration, organizational participation, and expanded our geographic reach to include more nonprofits from rural communities. These unexpected benefits were an important factor in adoption of permanent remote work in December 2021. In response to the deepening needs of our members, as of January 2022, our team consists of five full-time staff members—a first in our history.
OUR MEMBERS

588
NONPROFIT MEMBERS

46
BUSINESS MEMBERS

43
INDIVIDUAL MEMBERS

UNA Members, located in 18 counties, serve all regions of the state.

UNA MEMBERS SERVE THE FOLLOWING AREAS

- 19% Human Services
- 18% Arts and Culture
- 12% Education
- 31% Housing, Youth Development, Recreation, Mental Health, and more

- 7% Environment/Conservation
- 7% Healthcare
- 6% Public/Societal Benefit

56% of UNA Members fulfill their missions on budgets under $500K

DISTRIBUTION OF OUR MEMBERS BASED ON THEIR ANNUAL OPERATING EXPENSES
Finding new funding prospects is crucial for nonprofits. UNA offers access to Grantstation, an online funding database, at a deep discount, saving members thousands of dollars each year.

SUPPORT

Our members are what make us unique. We are a network of like-minded individuals and organizations working to fulfill our missions and serve our communities. UNA membership provides a deeper connection to the nonprofit community and opens a wide array of cost-saving benefits, services, and resources that assist nonprofits in increasing organizational capacity and reducing expenses. Membership also helps staff broaden their skill development and connections with peers. Through a revamped online portal, Member Central, members have access to everything they need—from expert HR support to templates, insurance resources, on-demand training, the UNA Help Desk, job postings, and much more.

UNA HELP DESK

Launched in October of 2020, the UNA Help Desk provides a quick and easy way for members to submit unlimited support questions. Members receive support on topics like fundraising, HR, finance, volunteer management, and more.

ON-DEMAND TRAINING

The 2020 shift to online training made recordings available for members to watch at their convenience. We received over 1,000 views on our YouTube channel and 150 hours of on-demand viewing.

GROUP HEALTH INSURANCE

UNA members can purchase health, dental and vision, and telehealth insurance coverage as a larger group, reducing their costs and overhead expenses.

GRANTSTATION

Finding new funding prospects is crucial for nonprofits. UNA offers access to Grantstation, an online funding database, at a deep discount, saving members thousands of dollars each year.

UNA JOB BOARD

One of the most important member benefits, the UNA Job Board hit record levels in 2021 with a 40% increase in job postings compared to 2020 (813 posts to 1,357). In 2021, we saw 30,629 hits on posted jobs and over 150K page views on the job board webpage.
“As an Executive Director of a nonprofit, you find yourself pulled in many different directions. With so many various tasks to face every day, UNA has been a place to find the right information, support, and assistance. From using the job board to announce job openings to consulting the several reports that UNA publishes, everything that UNA offers is useful, valuable, and beneficial!”

ENCARNI GALLARDO
UNA BOARD MEMBER
EXECUTIVE DIRECTOR
CHILDREN’S SERVICE SOCIETY
COMMUNITY

We connect our members and the nonprofit community with highest quality learning opportunities and timely and purposeful communications so that Utah’s nonprofit professionals are equipped with effective knowledge and tools to grow their skills and advance their organization’s missions. Our events, social media, and communications bring nonprofits, businesses, foundations, and individuals together to make our state and world a better place.

REGROUP: THE 2021 UNA ANNUAL CONFERENCE

Dr. Atyia Martin of All Aces Inc.

The 2021 UNA Annual Conference, held online in September, brought 530 attendees from 100 organizations from across the state together for three days of virtual learning and connections. Featuring nationally recognized keynote speakers, 15 targeted breakout sessions, networking opportunities, awards, and a virtual expo hall, the conference brought practical solutions and new perspectives on our missions, our organizations, and our communities. Dr. Atyia Martin’s keynote address on what an equitable and resilient organizational culture looks like was a conference highlight!
I just want to take a moment to tell you all how much UNA has helped me guide my nonprofit art center through the past year. As an Executive Director, I have had to be constantly unrelentingly aware of fast-changing situations in both pandemic safety and funding, and UNA has been a steady source of good information and assistance.

We are still here, and still serving the community in large part because of UNA's support. Please know that your work is crucial to Utah's nonprofits. You help us do our jobs and do them well and the entire state benefits greatly.

ALYSA REVELL
EXECUTIVE DIRECTOR
BOUNTFUL DAVIS ART CENTER
THE 2021 UNA CREDENTIAL
MORE PARTICIPANTS, MORE BADGES, MORE LIVES CHANGED

We delivered our complete slate of nine Credential courses online in 2021. Online delivery made participation easier and transformed what had been Wasatch Front-centric training to training that delivered a state-wide impact.

We worked with our Credential subject-matter-experts and an expert in equity and inclusion in a multi-step process to refashion Credential curricula and Badges to support nonprofits in building more equitable and inclusive organizations. Our effort yielded practical actions that nonprofits could incorporate in their practices to nurture equity and inclusion at their organizations.

Mountain West Mothers’ Milk Bank (above left) and Human Society of Moab Valley (above right) became the second and third organizations to complete all nine Badges and earn our highest award, the UNA Credential.

Participants learned new information, strategies, and practices to use in making their missions happen. This commitment to excellence impacts both their current nonprofit and finds its way into other areas in the nonprofit sector. We believe that this same infusion will happen with the practices that support equity and inclusion—providing another a small, but meaningful, step to change the world.
The UNA Credential program has been very valuable to our team here at YCC. In addition to myself, I have had seven other members of our leadership team participate in UNA programming and complete Credential Badges. As a leader who tries to provide learning opportunities and experiences for our team, the UNA Credential program is a tremendous resource. The true test of any training is whether or not people implement the learning in meaningful ways following the experience. I am happy to report that components of each badge have been incorporated in one way or another here at YCC and each has helped us improve our processes, practices, policies, or culture.

MARGARET ROSE
EXECUTIVE DIRECTOR
YCC FAMILY CRISIS CENTER
2021 UTAH PHILANTHROPY DAY

Hosted by UNA, UServeUtah, and the Association of Fundraising Professionals Utah Chapter, Utah Philanthropy Day uplifted spirits and spread good cheer among the honorees and nominating nonprofits. The November 15, 2021 celebration, televised in partnership with ABC4 Utah and viewed by 15,000 households, recognized exceptional volunteers, foundations, and philanthropists in our community. Heart and Hands, an important part of the event, provided nonprofit leaders with a public and meaningful way to acknowledge star volunteers and honored 89 exceptional individuals.

UTAH PHILANTHROPY DAY HONOREES

Stephenie Larsen  
Labor & Honor Award

Haven J. Barlow  
Philanthropic Leadership Award

Community Foundation of Utah  
Foundation Spirit of Giving Award

Savage  
Corporate Spirit of Giving Award

Lynda Smart Brown  
Governor’s Career Humanitarian Leadership Award

Natalie Gochnour  
Lt. Governor’s Public Service Award

Natalie Green  
Outstanding Young Volunteer Award

Michael Aguilar  
Outstanding Volunteer Award

UNA NONPROFIT LEADER AWARDS

Since 2017, UNA has honored the dedication and hard work of incredible individuals devoted to the amazing missions of Utah’s nonprofits. Nominated by their colleagues, board members, peers, and staff, UNA Nonprofit Leader Award honorees represent the passion, dedication, tireless work ethic, and exceptional leadership that nonprofit professionals bring to their organizations every day.

KRISTEN MITCHELL  
2021 UNA OUTSTANDING NONPROFIT LEADER  
Founder/Executive Director  
Youth Futures

WATCH KRISTEN’S HIGHLIGHT VIDEO

HOPE ZITTING-GOECKERTIZ  
2021 UNA EMERGING NONPROFIT LEADER  
Executive Director  
VOTERISE

WATCH HOPE’S HIGHLIGHT VIDEO
We are the voice and advocate for the nearly 11,000 nonprofits in Utah. We work for sound public policy and to protect nonprofits’ rights and benefits under law and regulation at the state and federal level. We also support our members’ advocacy efforts by providing training and opportunities for capacity building and engagement in nonprofit advocacy.

**2021 NONPROFIT DAYS "ON THE HILL"**

UNA’s Annual Nonprofit Day on the Hill brought nonprofits together in a whole new way. Instead of one day on the hill, we had many virtual days “on the hill.” Attendees participated through a variety of channels including:

- Watch parties
- Online training with legislative stakeholders
- Participation in the Utah Nonprofit Employee Day of Recognition
- Meetings with elected officials
- UNA’s Legislative Session Recap

**ADVOCACY SUPPORT**

Two Calls to Action on the American Rescue Plan Act to support COVID-19 relief funding for Utah nonprofits at the federal and state levels

Four virtual townhalls with Utah’s federal Congressional Representatives

Advocacy Essentials and the Credential in Advocacy and Civic Engagement provided skills and knowledge

**ECONOMIC REPORT TO THE GOVERNOR**

In partnership with the Utah Economic Council, we authored the Nonprofit Sector Chapter which highlights the current status of the nonprofit sector and the future outlook of nonprofit work in Utah and its economic impact.

[READ THE ERG 2021 NONPROFIT CHAPTER]

[2021 UTAH NONPROFIT SECTOR REPORT]
Race, Equity, Diversity, and Inclusion (REDI) is integral to UNA and for the past several years, we have been methodically laying the groundwork to establish UNA as an equitable and inclusive organization and an example of a REDI-focused nonprofit. We have long known that addressing REDI was an internal responsibility and one that would be widely useful to our members as we developed our REDI framework and implementation. Embedding REDI values into any organization requires intentionality, openness, humility, and most of all, time. We are far from being complete in this work, but both UNA Board and Staff are committed in this journey.

**OUR REDI JOURNEY CONTINUES...**
Thank you to all the individual donors, businesses, banks, and foundations that make our work possible. We are grateful for your financial support and your commitment to making nonprofits stronger and our communities thrive. Your support helps bring comfort, hope, food, shelter, healing, support, protection, inspiration, and education to all Utahns. We made every effort to ensure that this list is comprehensive, if you believe we have made a mistake, please let us know at info@utahnonprofits.org.

CORPORATIONS, BANKS, AND FOUNDATIONS
American Express Center For Community Development
Beehive Insurance Agency
BKD CPAs & Advisors
Bloomerang
Daniels Fund
Dominion Energy
First Nonprofit Group
George S. & Dolores Doré Eccles Foundation
Goldman, Sachs & Co.
Google Fiber
Incite Consulting
Intermountain Healthcare
JadeFire Development
Larson & Company
Morgan Stanley Bank, N.A.
NOW CFO
Pathway Associates
Regence BlueCross BlueShield of Utah
Smith's Food and Drug
Tanner LLC
The Lawrence T. - Janet T. Dee Foundation
Third Sun Productions
Union Pacific Foundation
Unite Us
Wells Fargo Bank

INDIVIDUAL DONORS
Paul Burnett
Pook Carson
Hope Gilis
Don Gomes
Peggy Green
Mara Haight
Liz Han
Stephanie Harpst
Rob Harter
Susan Isbell
Jocelyn Kearl
Lydia LaSalle
Sonya Martinez-Ortiz
Eric Marx
Cyndy Miller
Liz Owens
Julianna Potter
Kyle Robbins
Laura Roden
Kate Rubalcava
Patty Shreve
Richard Scoresby

UTAH PHILANTHROPY DAY SUPPORTERS
Acahand Foundation
Anonymous Family Foundation
Brandless
David Eccles School of Business
Daniels Fund
Dominion Energy
doTerra
George S. & Dolores Doré Eccles Foundation
Intermountain Healthcare
KeyBank
Labor and Honor Foundation
Mercato Partners
Mountain America Credit Union
O.C. Tanner
Pathway Associates
George Severson
Third Sun Productions
Greg Warnock
Wells Fargo
XMission
Zions Bank

Photos courtesy of our members.
STAFF
Kate Rubalcava
Chief Executive Officer

Jill Bennett
Director of Programming and Marketing

Brandy Strand
Director of Community Relationships

Alison Anderson
Operations and Special Projects Manager

Katie Balakir
Communications and Advocacy Coordinator

BOARD: EXECUTIVE COMMITTEE

Peggy Green, Chair
Iron County Care and Share

Liz Dana Han, Vice Chair
WabiSabi

Dr. Rob Harter, Past Chair
Park City Christian Center

Paul Burnett, Treasurer
Tanner LLC

Luke Deppermann, Secretary
Kirton McConkie

Princess Gutierrez
Shelter the Homeless

Shawn Newell
Industrial Supply Company

BOARD: DIRECTORS

Dr. Pook Carson
Salt Lake Community College

Dr. Ruby Chou
Mundi Project

Natalie El-Deiry
International Rescue Committee

Encarni Gallardo
Children's Service Society

Mara Haight
Utah Center for Post Traumatic Growth

Charese Jamison
CHG Healthcare

Eric Marx
Community Representative

Liz Owens
YWCA Utah

Julianna Potter
Salt Lake County Youth Services

Patrick Risk
June Homes

Kyle Robbins
Larson & Company

Ed Roberson
JourneyTeam

David Schmidt
Community Representative
COMMITTEES

ANNUAL CONFERENCE
Ruby Chou (Chair)
Alison Anderson
Rosa Bandeirinha
Kerry Carlson
Encarni Gallardo
Megan Millar
Tessa Vaschal
Diego Zegarra

MEMBERSHIP
Pook Carson
Charese Jamison
Eric Marx
Monica Rafferty
Ed Roberson
David Schmidt
Brandy Strand

GROUP HEALTH PLAN
Becky Bell
Kristy Chambers
Gina Cornia
John Gold
Amy Jenkins
Crys Lee
Eric Marx
Kate Rubalcava
Todd Valentine
Carolyn Young

PUBLIC POLICY AND ADVOCACY
Melia Dayley
Kristen Edwards
Maddie Hayes
Collyn Mosquito
Liz Owens
Julianna Potter
Patrick Risk
Kyle Robbins
Kate Rubalcava
Susan Speirs
Brandy Strand
Hope Zitting-Goeckeritz

RACE, EQUITY, DIVERSITY,
AND INCLUSION (REDI)
Alison Anderson
Natalie El-Deiry
Princess Gutierrez
Mara Haight
Liz Dana Han
Shawn Newell
Ed Roberson
Kate Rubalcava
Brandy Strand

UTAH PHILANTHROPY DAY
Jeanette Bennett (Chair)
Kent Bowman
Sara Dorsey
Judy Fang
Mara Haight
Mike Moon
Lindsay Nelson
Kate Rubalcava
Liza Springmeyer
LaDawn Stoddard
Sharlene Wells
UNA is committed to financial accountability and transparency. Below is a summary of financial activity for the period January 1, 2020 to December 31, 2020, from our most recent audited financial report and IRS Form 990.

### 2020 INCOME

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$265,084</td>
<td>58%</td>
</tr>
<tr>
<td>Membership Dues</td>
<td>$134,780</td>
<td>30%</td>
</tr>
<tr>
<td>Program Service Delivery</td>
<td>$46,955</td>
<td>10%</td>
</tr>
<tr>
<td>Member Services</td>
<td>$5,700</td>
<td>1%</td>
</tr>
<tr>
<td>Interest/Other</td>
<td>$3,433</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>$455,952</td>
<td>100%</td>
</tr>
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</table>

### 2020 EXPENSES

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs and Services</td>
<td>$281,688</td>
<td>80%</td>
</tr>
<tr>
<td>Administration</td>
<td>$61,514</td>
<td>17%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$9,360</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$352,562</td>
<td>100%</td>
</tr>
</tbody>
</table>