

# UTAH NONPROFITS ASSOCIATION

UNIFY | STRENGTHEN | ELEVATE



ANNUAL REPORT 2021

CANYONLANDS NATIONAL PARK

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Canyonlands Field Institute



Wild Heart Sanctuary



Neighborhood House



Red Butte Garden  
(Photo courtesy of the University of Utah.)

*Photos courtesy of our members.*

# ABOUT UNA

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.

### CAPITOL REEF NATIONAL PARK



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,



A handwritten signature in cursive script that reads "Katherine Rubalcava".

**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.



A handwritten signature in black ink, appearing to read 'Peggy Green'.

**PEGGY GREEN**

2021 UNA BOARD CHAIR  
EXECUTIVE DIRECTOR  
IRON COUNTY CARE AND SHARE

# OUR WORK

## OUR WORK IS THE WORK AND SUCCESS OF UTAH'S NONPROFITS

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.



Tracy Aviary



Granite Education Foundation



Davis Arts Council

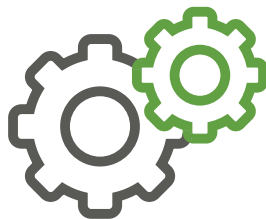
*Photos courtesy of our members.*

# OUR MEMBERS



**588**

**NONPROFIT  
MEMBERS**



**46**

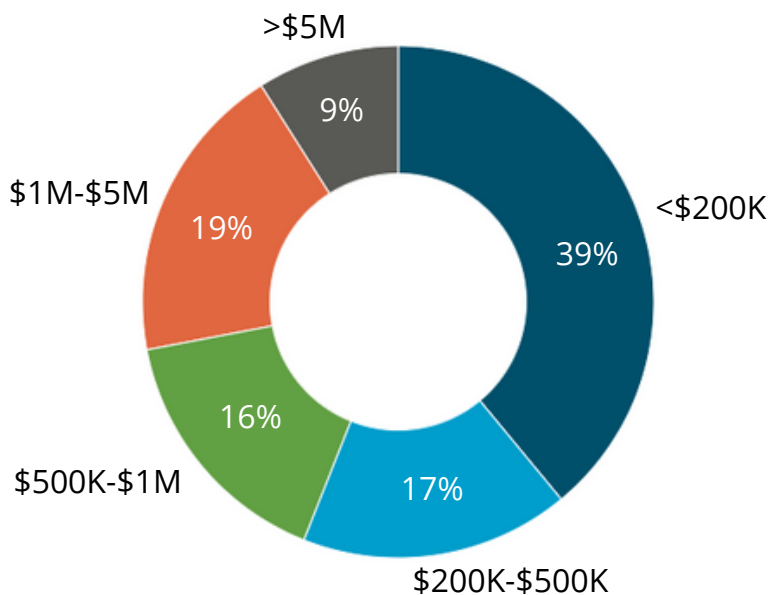
**BUSINESS  
MEMBERS**



**43**

**INDIVIDUAL  
MEMBERS**

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



DISTRIBUTION OF OUR MEMBERS BASED ON THEIR ANNUAL OPERATING EXPENSES

**56%**

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



## 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

# 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.

**473**

UNA Help Desk requests

## 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 watch time.

**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.

**947**

individuals covered by UNA group health insurance

## 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.

members saved over

**\$32,000**

**1,357**

member postings on the UNA Job Board

## 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.





**SAN RAFAEL REEF, SAN RAFAEL SWELL**

“

“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.



## 2021 EVENT SNAPSHOT

**53**

TRAINING  
OPPORTUNITIES

**275**

PARTICIPATING  
ORGANIZATIONS

**530**

UNA CONFERENCE  
ATTENDEES

**906**

UNA EVENT  
ATTENDEES

## UNA COMMUNICATIONS



### EMAIL CAMPAIGNS

142 emails sent to 4,331 people



### EMAIL LISTSERV MEMBERS

57 Utah Nonprofits Connect  
37 Advocacy League



### WEBSITE

608K Page Views  
63K Users

## SOCIAL MEDIA FOLLOWING



3,953



3,381



2,721



683

## 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  
BOUNTIFUL DAVIS ART CENTER



# EMPOWER

## 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.



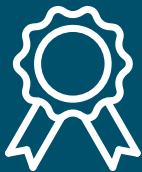
**9**  
COURSES

**177**  
PEOPLE



**85**  
NONPROFITS

**45**  
BADGES  
AWARDED



**2**  
CREDENTIALS  
EARNED



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.



A stylized landscape illustration of Antelope Island, Great Salt Lake. The scene features a body of water in the foreground, a small tree on the left, and rolling hills in the background under a blue sky with orange and white clouds.

**ANTELOPE ISLAND, GREAT SALT LAKE**

“

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.

”

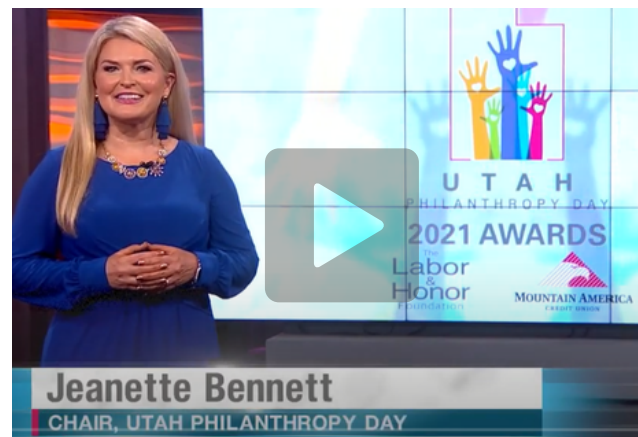
**MARGARET ROSE**

**EXECUTIVE DIRECTOR  
YCC FAMILY CRISIS CENTER**

# CELEBRATE

## 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 Gochmour**

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](#)



# ADVOCATE

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

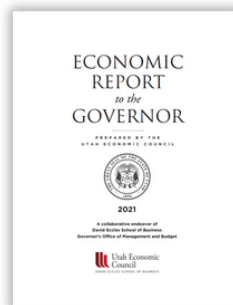


Four virtual townhalls with Utah's federal Congressional Representatives



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](#)

# COMMITMENT

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.





# SUPPORTERS

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@utahnnonprofits.org](mailto:info@utahnnonprofits.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.*



Habitat for Humanity of  
Southwest Utah



Wasatch Adaptive Sports



Iron County Care and Share

## 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**  
Kirtan 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

## ANNUAL CONFERENCE

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

## GROUP HEALTH PLAN

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

## MEMBERSHIP

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

## 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

## 2020 FINANCIAL SUMMARY

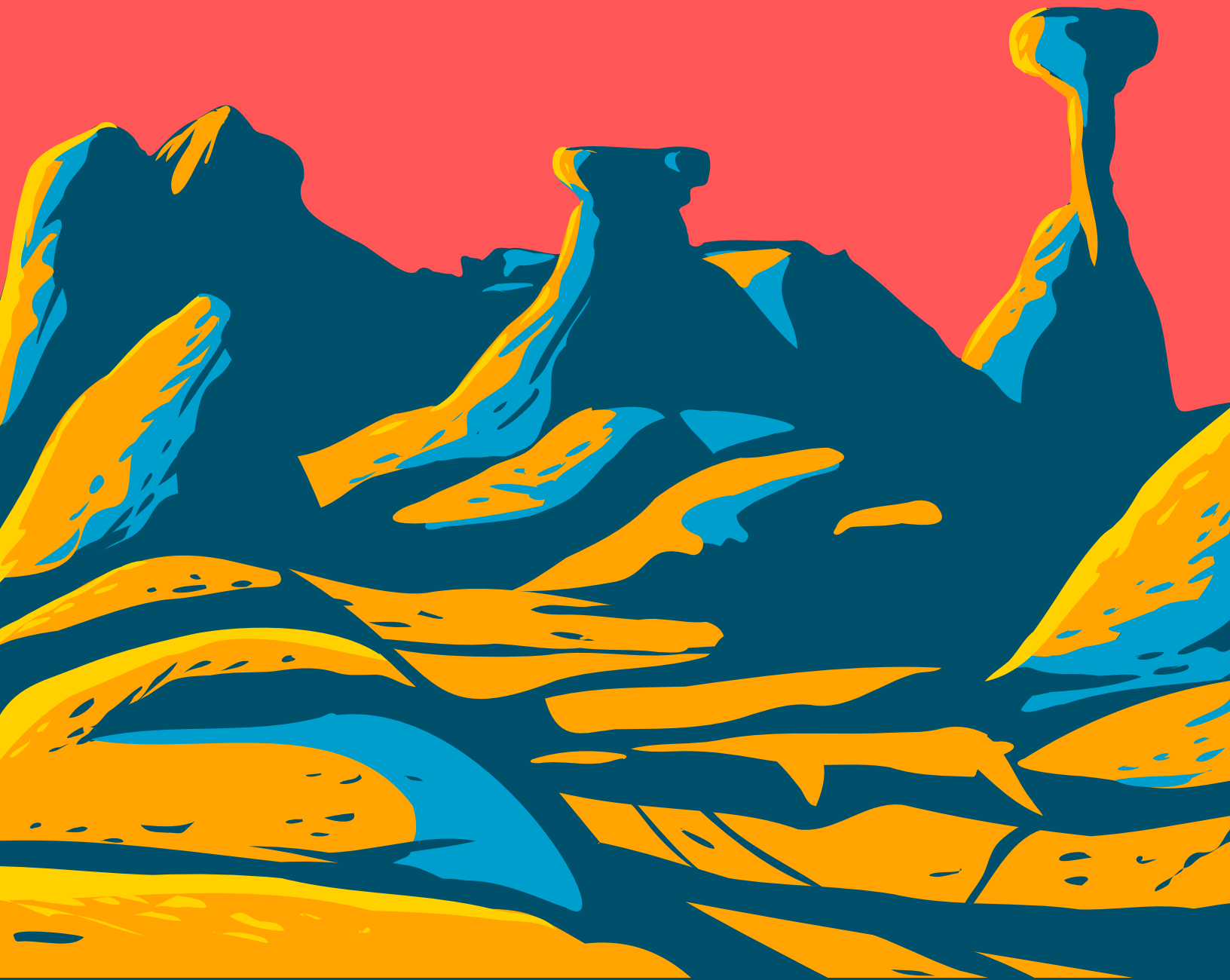
UNA is committed to financial accountability and transparency. Below is a summary of financial activity for the period January 1, 2020 to December 31, 2020, from our most recent audited financial report and IRS Form 990.

2020 INCOME	AMOUNT	PERCENTAGE
Contributions	\$265,084	58%
Membership Dues	\$134,780	30%
Program Service Delivery	\$46,955	10%
Member Services	\$5,700	1%
Interest/Other	\$3,433	1%
<b>TOTAL INCOME</b>	<b>\$455,952</b>	<b>100%</b>

2020 EXPENSES	AMOUNT	PERCENTAGE
Programs and Services	\$281,688	80%
Administration	\$61,514	17%
Fundraising	\$9,360	3%
<b>TOTAL EXPENSES</b>	<b>\$352,562</b>	<b>100%</b>



GRAND STAIRCASE ESCALANTE



P.O. BOX 65782  
SALT LAKE CITY, UTAH 84165

[UTAHNONPROFITS.ORG](http://UTAHNONPROFITS.ORG)

@UTAHNONPROFITS

