

# 2017 ANNUAL COMMUNITY REPORT



THE LUPUS  
FOUNDATION  
OF SOUTHERN ARIZONA



## FACTS

The “Butterfly” is symbolic for the butterfly rash that commonly appears across the bridge of the nose of several Lupus patients.

1.5 Million Americans and 5 Million worldwide have Lupus.

Lupus is more prevalent than AIDS, sickle cell anemia, muscular dystrophy, cerebral palsy, multiple sclerosis and cystic fibrosis COMBINED.

Lupus is NOT infectious, rare or cancerous.

Lupus affects 1 out of every 185 people; 90 percent of whom are women.

Lupus is more prevalent in African Americans, Latinos, Native Americans and Asian Americans.

Sunlight, infection, injury, stress or exhaustion can trigger “flares” (a more active state of the disease) in Lupus patients.

Lupus is the least known of all major diseases.

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## *From Your President*

The LFSA Board members celebrated three very successful fundraising events in 2017. The 17<sup>th</sup> Walk-the-Loop-for Lupus at Reid Park in April, the May Hit-the-Links-for-Lupus at Omni Tucson National and the 3<sup>rd</sup> Annual Gala in October at the beautiful Skyline Country Club all brought in substantial revenues by generous donors to enable us to serve patients and bring Lupus awareness to the community of Southern Arizona. We had the privilege of honoring Stanley Lehman at the Gala this year for his commitment and ongoing support of the Foundation since 2013.

Our programs continue to reach new participants and provide aid, awareness and comfort to patients and education to the larger community. We are proud to have funded nine partial scholarships this year, for a total of twelve recipients to date. Two of our recipients graduated this year! Through LFSA Cares and the Emergency Medical Fund we were able to assist patients financially impacted by this devastating illness. Two Women's Retreats were held in 2017 which brought several new participants to the experience through our Support Groups. These programs are a testimonial to LFSA's commitment to provide support to everyone in families impacted by Lupus.

The year 2017 saw staff changes at the Foundation office, including the addition of a second part time employee to assist with the expanding work of the Foundation. On February 21, 2017, Tyler Pierce joined the team as an Administrative Associate, whose main responsibilities include all database and social media management, grant writing, advertising, development of publications and print media, videography and assistance with event planning. Tyler's friendly voice and smiling face is one of the first people you encounter by phone or visit to the office.

On July 17, 2017, Pamela Anderson was hired as an Administrative Associate whose primary responsibilities include bookkeeping, with oversight by the Board Treasurer, tracking of donor activity and program participation, assisting scholarship applicants and those requesting emergency medical and financial assistance, as well as foundation membership, scheduling and day to day office management. Pam, with her warm and caring demeanor, is also one of the first people you encounter as a voice of the Foundation.

Both Tyler and Pam help new patients to complete intake information, answer questions, explain programs and offer the resources of the Foundation to both new and returning patients.

On July 21, 2017, Director of Administration, Luci Ponticelli, retired after two and one-half years as the Administrator and friendly voice and face of the Foundation. Her tireless efforts helped maintain all programs of the Foundation, contact with patients and interaction with the Board. We thank her and wish her all the best!

Please consider becoming a member of the LFSA. Your membership will help support our programs and you will receive email updates, the bi-annual LFSA Magazine, which includes medical updates, articles, patient interviews, news about programs, fundraising events and community outreach. You can become a member by visiting our website at [www.lupus-az.org](http://www.lupus-az.org) or by calling our office at 520-622-9006.

The Lupus Foundation of Southern Arizona is here for people impacted by Lupus. Please stay in touch with us, either by phone or visit, through Facebook or a visit to [www.lupus-az.org](http://www.lupus-az.org).

*Sharon Joseph*  
*LFSA Board President*

## OUR MISSION STATEMENT

**To provide support, education and partnership to those affected by Lupus, while promoting the development and enhancement of health and social welfare at the local level.**

The Lupus Foundation of Southern Arizona  
exists for one reason only... to provide all possible support  
to those dealing with the disease.



# **2017 ANNUAL REPORT TO THE COMMUNITY**

**Fiscal Year October 1, 2016-September 30, 2017**

## **INTRODUCTION**

The Lupus Foundation of Southern Arizona Inc. (LFSA) was founded 40 years ago in 1978 by five people dedicated to giving Lupus patients an opportunity to come together, learn about the disease and help each other to live a quality life. It continues to serve Lupus patients in Southern Arizona with new and expanded programming designed with a quality of living focus.

The LFSA is a nonprofit 501 c 3 serving the needs of Lupus patients in Pima, Pinal, Santa Cruz Cochise and Graham Counties. A very active and strong Board of Directors leads the organization with purpose and focus on the LFSA mission. The mission ensures delivery of a program of general education to increase public awareness, disease knowledge and support for our Lupus patients, and fosters the exchange of information among physicians and healthcare professionals.

## **PATIENT DEMOGRAPHICS**

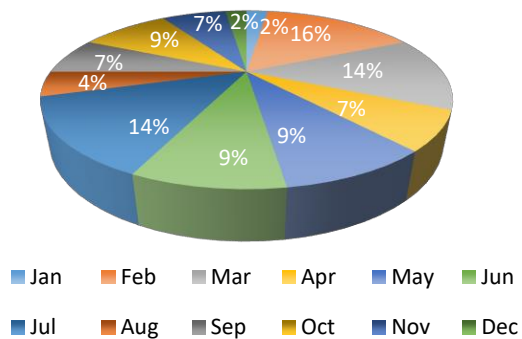
LFSA serves all Lupus patients regardless of race, color, creed, age, gender or economic status. The Foundation tracks its level of activity throughout the year whether from a phone call, a walk-in patient, caregiver or interested person on behalf of another Lupus patient.

## **INTAKES**

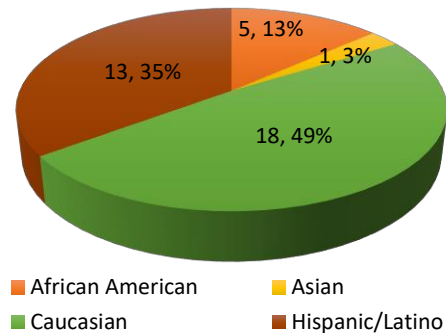
Intakes are designed to collect information about the patients served by the LFSA. Intakes are completed by the patient in person or a staff member completes the intake on the phone when a patient is not available. This information is critical to tracking patient activity and assessing our programs.

In 2017, forty-three new intakes were completed by or on behalf of patients. We continue to raise awareness about Lupus in the community and to improve our patient information tools, record keeping and procedures.

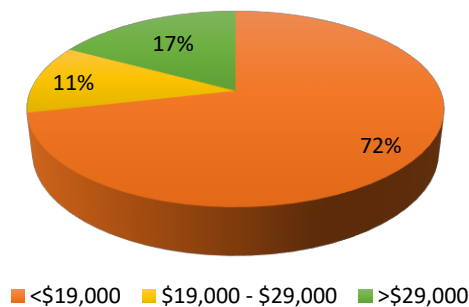
### Intakes by Month



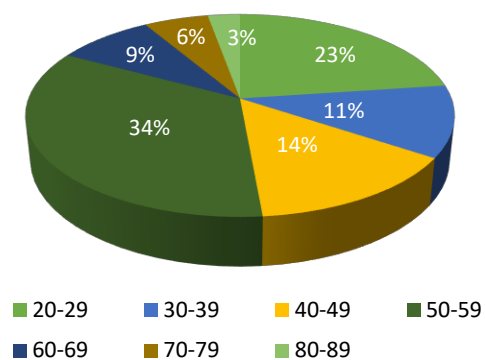
### Demographics



### Income



### Age



National data shows that 90% of patients diagnosed with Lupus are women. Intake information collected from the Southern Arizona region reveals that 97% of patients who completed an intake and were informed of the services and programs offered by the LFSA were women. Over 72% of the intakes in 2017 earn less than \$25,000 a year and live at or below the poverty level. It is also important to note, that many of these patients reported having Lupus less than 3 months and were receiving government funded health insurance.

## TOTAL TRAFFIC

LFSA staff maintains a traffic log of all walk-ins and phone calls during the year. It includes calls for general information, requests for Lupus chapters elsewhere in Arizona (Phoenix) and outside of Arizona, including New Mexico and Mexico, family caregivers seeking assistance for a family member with Lupus, those relocating to the Tucson area who are Lupus patients, Lupus patients seeking assistance with our scholarship program and other available programming, including calls from Lupus patients we are currently serving in our system. In 2017, we logged 126 inquiries from callers and walk-ins, a 45% increase in overall traffic.



## LFSA MAJOR PROGRAMS

In 2017, the LFSA continued the programming begun in 2015-2016, with a focus on support groups, educational attainment, retreats, emergency medical and non-medical assistance, and more!

### **SCHOLARSHIPS**

The Scholarship Program is an academic study program to underwrite degree/vocational education of Lupus patients. LFSA offers 2-year scholarships up to \$3,000 per year. Recipients are voted on by the Board Officers. Applicants apply via the LFSA website. Our current scholarship recipients are enrolled in programs focusing on nursing, social work, business management, nutrition and art education. Students must maintain a minimum Grade Point Average (GPA) of 3.0 to qualify for this scholarship and most are achieving a GPA of 3.4 and above.

#### **Outcomes:**

***We were able to fund nine students with partial scholarships in 2017, two of whom graduated this year. To date scholarship recipients are from Pima and Cochise counties.***



*I didn't have the money to go back to school, and it's hard to go into debt. I was hesitant to take out a loan. Learning that there was financial help was great. The LFSA scholarship covers the semester and I only pay for the books. The scholarship has made it affordable for me to attend school. I would like to say thank you to the Foundation. You guys have been awesome! After getting in touch with the Lupus Foundation I finally feel like I'm stepping in the right direction.*

-Haley Anderson, LFSA Scholarship Recipient  
2017 Graduate

### **LFSA EMERGENCY MEDICAL FUND**

For many people with Lupus, the path to diagnosis can be long and arduous. It is not uncommon for health insurance plans to put a cap on the total amount of medical services covered annually. However, most plans also cap the amount of medical services covered over a lifetime. In both instances, expenses beyond the coverage caps must be paid out of the insured person's pocket.

Once diagnosed with Lupus, the journey becomes a life-long commitment to medical testing, pharmaceuticals, and medical related equipment (when required) and emergent procedures/surgeries. **There is no cure.** Once insurance coverage runs out along with other private funding (if there is any) there is no other option. This important fund supports the health needs of our Lupus patients by providing the monetary wherewithal to get the medical services required, and directly benefits the patient's immediate needs. Patients must complete a qualification form, submit proof of a Lupus diagnosis and provide an invoice for their request. Each case is considered and approved by the Board of Directors. Payments are sent directly to the vendor. This fund is promoted on the [www.lupus-az.org](http://www.lupus-az.org) website and with our focus on more community awareness of the programs of the Foundation, it is beginning to attract those in need.

#### ***Outcomes:***

***This year we assisted a homeless lupus patient in obtaining medical care at a Tucson clinic. The medical condition of the applicant was serious and LFSA was happy to be a channel of support.***

### **LFSA CARES ASSISTANCE FUND**

The LFSA Cares Assistance Fund provides funds to Lupus patients for non-medical financial challenges on a one-time basis. Decisions are made by the Board of Directors. Patients must complete a qualification form, submit proof of a Lupus diagnosis and provide an invoice for their request. Payment is made directly to the vendor.

#### ***Outcomes:***

***In 2017 we were able to assist a seriously ill Lupus patient who was hospitalized for an extended time, including several months in a coma. Since she was unable to work, she was at risk of losing her home and her job. We made a mortgage payment for her and she was able to stay in her home. She is doing well as of this date and has offered her services to the Foundation as a contact person for Lupus patients.***





## **RETREATS**

This program is a “close-in” forum at offsite locations for Lupus patients, caregivers & families where they can take some time for themselves to rest, relax and receive input concerning various topics such as: disease awareness, pain management, coping strategies, stress reduction, relaxation, exercise, diet and nutrition, caregiver/family awareness, etc. Two retreats for women were held in 2017. LFSA covers 100% of the cost for each attendee.



### ***Outcomes:***

***LFSA hosted 20 women at two retreats in 2017. Eight women participated in the retreat at White Stallion Ranch in June and twelve women participated in the November Retreat at La Posada Lodge and Casitas. Retreats are facilitated by Board Members, guest speakers and volunteers, some of whom have Lupus.***



## **SUPPORT GROUPS**

Support Groups are for Lupus patients, their families, and caregivers who come together for camaraderie, disease awareness, pain management, coping strategies, new treatments, etc.

### **Coffee Talk**



11 *Coffee Talk* groups were held at the LFSA office at 4602 E Grant Rd. on the 1<sup>st</sup> Wednesday of every month at 6 pm. These group meetings are facilitated by Board Members and are designed to be open forum discussions.

### **Living with Lupus**



11 *Living with Lupus* groups were held at the LFSA office at 4602 E Grant Rd. on the 3<sup>rd</sup> Wednesday of the month at 10 a.m. The morning group is topic oriented and was facilitated by Rebecca Shields, Board President or Sharon Joseph, Board Member. Guest speakers included healthcare practitioners, nutritionists, motivational speakers, Board Members, etc.

Topics covered in 2017 included:

- Managing Care: Tracking your Lab Work
- Adjusting to a Chronic Illness
- Working with Your Physician
- Medication Safety
- Lupus Fatigue
- Lupus Symptom Management through Better Nutrition and Healthy Eating in the Summer, Kariman Pierce, NTP
- Advocate for Your Own Medical Care, Tamara Michelle, Motivational Speaker
- The Lupus Secrets Checklist: Simple Reminders that can Bring Real Change to Patients
- Planning for Group Discussions
- Open Forum Discussion



### **Outcomes:**

***We are happy to announce a 15% increase in support group attendance overall in 2017. There were 64 attendees in the evening and 80 attendees in the morning for a total of 141 participants. Support group participation varies each month based on the individual's needs, the topic of the month and the demand for Lupus disease education, quality of living and coping strategies.***

“The support group is so meaningful to me – to have fellowship with people who understand the disease and all that comes with it.” - Melissa Dreyer

“When I was diagnosed in 2014, I thought I was going to die. I found the LFSA website online and went to my first Coffee Talk meeting. It saved my life. I no longer felt alone.” - Terry Davis

“The support group has been good for me and I feel I am also a support to others – especially the new ones who come in.” – Donna Kidder

### **CAMPS FOR KIDS**



Applications for the Camps for Kids program can be submitted for children who are impacted by Lupus. Recipients receive up to \$150 per child. LFSA is currently evaluating this program to assess current need among Lupus patients and their families.

## ONGOING SERVICES

### **RESOURCE KITS**

Resource Kits are available for Lupus patients served by LFSA. Kits contain information about the Foundation's programs, as well as items such as sunscreen, lip balm, pill containers, etc., that are useful tools for Lupus patients.

#### ***Outcomes:***

**We distributed approximately 35 resource kits to new patients in 2017. Each new patient who completes a Patient Intake Form or attends a Coffee Talk or Living with Lupus Support Group for the first time receives a Welcome Resource Kit.**

### **AMY'S BLANKETS**

Amy's Blankets are given to Lupus patients to provide comfort and warmth. Amy and her husband, Derrick, performed as a musical folk duo "Nowhere Man and a Whiskey Girl". Amy and Derrick were married for 13 years and were deeply in love. Amy was diagnosed with Lupus as a young adult. One of the complications she endured was kidney failure, requiring chronic dialysis. In October 2013, after a 19-year battle with Lupus, Amy passed away at the age of 40. After her passing, Amy and Derrick's friends, family and fans came together to bring awareness and raise funds for programs related to Lupus.

During the many years of dialysis, Amy would comment to her family how cold she was during her treatments. LFSA designed a blanket for others who are undergoing Lupus treatments to provide comfort and warmth. This blanket is provided to Lupus patients in honor of Amy's memory and the lasting affect she has had on the Lupus community in Southern Arizona.

### **BILINGUAL SERVICES**

The LFSA assists patients who speak Spanish. This service has provided bilingual program awareness and disease counseling to many patients who have requested the service or during a support group gathering. Information was disseminated to these patients in Spanish from the Lending Library and online. Spanish speaking assistance is available through volunteers whose contact information is located on our website at [www.lupus-az.org](http://www.lupus-az.org).



### **LENDING LIBRARY AND INFORMATION RESOURCES**

The Lending Library is available to all Lupus patients upon completion of a Patient Intake Form. In 2017 the library was enhanced with new Lupus publications such as, copies of *The Lupus Encyclopedia, A Comprehensive Guide for Patients and Families* by Donald E. Thomas, Jr., MD, FACP, FACR, published in 2014 and memory minders for patient healthcare tracking. Staff members continue to research and distribute the most recently published articles on disease treatment, medication, symptoms and discoveries that bring hope to our patients. Upon request, a staff member will assist patients in researching any specific items of interest.

### **ASSISTANCE AND REFERRAL**

Two LFSA Board Members have Lupus and are available to provide disease counseling to all new walk-in and phone patients. The Patient Intake Form is sent to these Board Members. Within 24-48 hours, a patient receives a phone contact. If required, patients may be referred to other community assistance sources to address an immediate need. LFSA maintains referral sources to ensure patients receive the best community support possible.

Lupus.  
Learn about it.

## COMMUNITY OUTREACH

The LFSA utilized Health Fairs, the bi-annual Lupus Foundation of Southern Arizona Magazine, the Foundation website, Facebook, brochures and tear pads in medical offices to reach its audience.

The use of social media such as our LFSA website at [www.lupus-az.org](http://www.lupus-az.org) and Facebook page at <https://www.facebook.com/lupusarizona/> provides opportunities to reach a broad audience of Lupus patients, community partners, supporters, the medical community and all of Southern Arizona. It also provides a platform for interaction between Lupus patients on an everyday basis.

### **HEALTH FAIRS**

We participated in three Health Fairs in 2017 (Rincon Country West RV Health Fair, Tucson Estates Health Fair and Green Valley Health Fair). The Lupus Foundation bi-annual magazine publication reaches an audience of several hundred Lupus patients, families, supporters and physicians by email and direct mail.

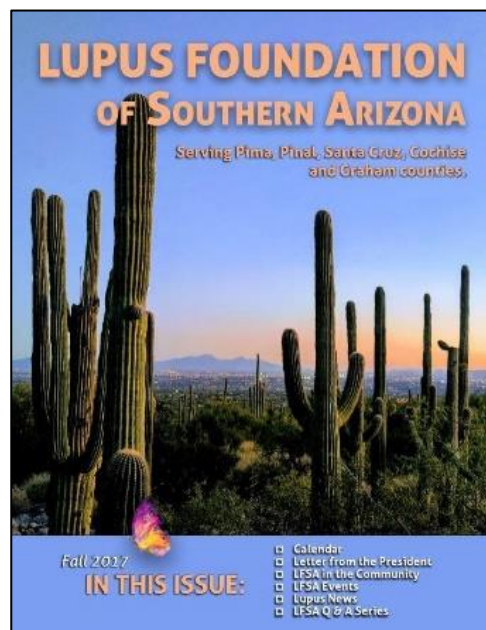
### ***Outcomes:***

**The total number of participants at these three Health Fairs was approximately 3,350 people.**

**Our display consists of posters in pictures of how Lupus affects the body and the programs offered through the Foundation. We spoke with a few hundred people and distributed LFSA brochures, NIH Lupus pamphlets in English and Spanish, several issues of the LFSA Magazine, pens and other giveaways. We invited those with Lupus to complete an intake form and attend our support groups.**

### **LFSA MAGAZINE**

In 2017 two editions of the bi-annual LFSA Lupus Magazine were published in house with a print and email circulation of 1,234 individual emails.



## LFSA FUNDRAISING AND FINANCIAL REPORTS

The LFSA fiscal year begins on October 1, 2016 and ends on September 30, 2017. All financial information is reviewed by a CPA throughout the year. The CPA prepares quarterly tax reports and the end-of-year IRS 990 tax return. Included in this Annual Report are LFSA Balance Sheets and Profit and Loss Statements for the 2017 fiscal year.

The LFSA is growing its revenue stream by increasing public awareness, grant writing, major fundraising events and small outside fundraising efforts each year.

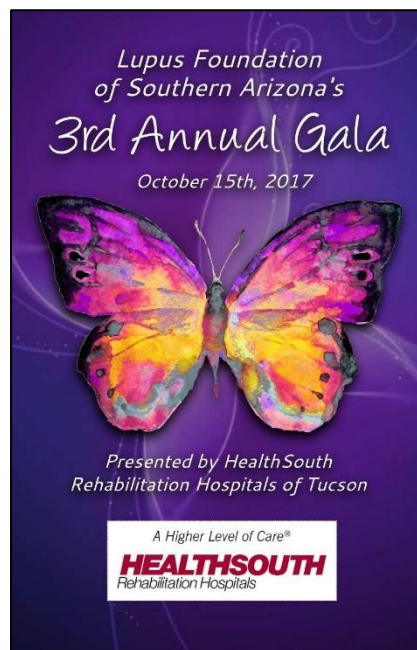


### **MAJOR FUNDRAISING EVENTS**

- |                              |                        |
|------------------------------|------------------------|
| Walk the Loop for Lupus      | - Annually in April    |
| Hit the Links for Lupus Golf | - Annually in May      |
| Gala                         | - Annually in November |

### **GRANTS**

Four grants were submitted in 2017 which resulted in \$4000 in grant awards. Grants were an important focus of the organization in 2017 and this effort is projected to expand in 2018.





### **OUTSIDE FUNDRAISING**

Two outside fundraising efforts hosted in 2017 raised a total of \$4114. The Jim Click Raffle raised \$1105 through ticket sales. Apple Annie's Apple Bread sales raised \$3009. Additionally, thirteen payroll planned giving programs resulted in a total of \$5,713.20 in donations in 2017.

### **MEMORIAL DONATIONS**

Each year the Foundation receives donations in memory of a loved one. In 2017 we received \$385 in memorial donations. We are deeply grateful for the continued support of these families and friends.

### **FOUNDATION MEMBERSHIP**

Annually, the LFSA conducts a membership campaign to recruit and renew members. In FY 2017 there were 43 paid members; 52% family memberships and 48% individual members. Currently, there are two levels of Membership in the LFSA: individual membership for a \$20 donation and family membership for a \$25 donation.

The members are invited to attend the Annual Meeting, usually in March. They receive the Annual Report, are invited to volunteer at Foundation events or at the board level and meet Board Members and patients who are in attendance.

In 2018, the Board of Directors is exploring a proposal to increase the Foundation's membership. This may include additional levels of membership, attendance at educational conferences, a % discount on Gala tickets and other offerings, based on the level of membership. Stay tuned.

## **2017 – 2018 BOARD OF DIRECTORS**

SHARON JOSEPH, MCSp – BOARD PRESIDENT

SHAUNNA SCHELIN-KOWALEWSKI – BOARD VICE PRESIDENT  
Director Marketing Operations – HealthSouth Rehab Hospital of So. Arizona

LANI BAKER, CPA, MBA – BOARD SECRETARY  
Vice President of Finance, Holualoa Companies

SHAIMA NAMAZIFARD, MBA – BOARD SECRETARY  
Assistant VP – Wells Fargo Bank

WENDY BLACK  
Assistant VP – Bank of America

SHERRI FRITZ  
Sales Representative – Young's Market

ABIGAIL GARCIA  
Arizona Children's Association

RICARDO HINDS  
Sr. Customer Quality Engineer – Honeywell

DONNA MORTON  
Director Development, Corporate Giving – TMC Foundation

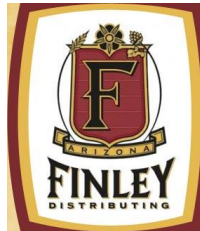
### **PRESIDENT'S COUNCIL**

Rebecca Shields, MBA  
Director Corporate Philanthropy – Finley Distributing LLC

### **MEDICAL ADVISORY BOARD**

Bridget Walsh, DO, Rheumatology – Catalina Pointe  
Mark Bradley, MD – Veteran's Administration Hospital  
Ernest Vina, MD, MS – University of Arizona Arthritis Center  
Tracy Epstein, MS, NCC, LPC  
David Whittman, MD, FASN, Nephrology,  
Arizona Kidney Disease & Hypertension Centers

## Special Thanks to our 2017 Community Partners!



4602 E. Grant Road  
Tucson, AZ 85712  
520-622-9006  
Fax 798-0972  
Toll Free 1-877-822-9006  
e-mail: [info@lupus-az.org](mailto:info@lupus-az.org)



## Lupus Fdtn. of Southern Arizona

## Profit &amp; Loss

October 2016 through September 2017

	Oct '16 - Sep 17
Ordinary Income/Expense	
Income	
Apple Annie's Fundraiser	3,009.00
Donations - Outside Fundraising	675.07
Dues - Membership	950.00
Gala Fundraiser	
Business	2,150.00
Gala Donations	3,580.00
Individual	6,652.00
Silent auction	11,290.00
Sponsorships	20,400.00
Gala Fundraiser - Other	0.00
Total Gala Fundraiser	44,072.00
General Donations	8,552.35
Golf Tournament Fundraiser	
Bottle Pull	560.00
Golf Pong	480.00
Individual	5,502.00
Mulligan Cards	915.00
Par 3	290.00
Raffle Tickets	1,620.00
Sponsorships	6,550.00
Total Golf Tournament Fundraiser	15,917.00
Grant Awards	4,000.00
Interest Income	42.78
Jim Click Raffle	1,105.00
Memorial Donations	385.00
Payroll Plan Donations	
American giving (Untd Way)	73.27
Arizona Comb Federal Camp 0051	1,546.71
Bank of Amer - Employee Giving	104.00
Benevity Community Impact	1,283.63
City of Tucson (Untd Way)	241.71
Comb Federal Campaign Overseas	31.72
Comb Federal Campaign SHR #0897	385.19
Comb Federal Campn SE Louisiana	15.38
Give w Liberty/Liberty Mutual F	231.99
Network For good	654.99
Pima County (Untd Way)	767.11
United Way Metro Chicago	349.60
YourCause-AT&T	28.00
Total Payroll Plan Donations	5,713.30
Walkathon Fundraiser	
Business	19,000.00
Individual	7,795.00
Individual sponsor	2,972.00
Sale of Memory Balloons	84.00
Silent Auction	3,320.00
Sponsorships (event)	500.00
T Shirt Sales	405.00
Table Vendor	25.00
team sponsors	1,093.00
Walk Donations	1,317.00
Total Walkathon Fundraiser	36,511.00
Total Income	120,932.50
Cost of Goods Sold	
Apple Annie's Cost	1,801.76

## Lupus Fdtn. of Southern Arizona

## Profit &amp; Loss

October 2016 through September 2017

	Oct '16 - Sep 17
<b>Gala Expenses</b>	
Adver/Promo	2,325.00
Facilities	12,410.67
Other	1,065.30
Postage	341.47
Printing	1,970.33
Silent Auction	166.03
<b>Total Gala Expenses</b>	<b>18,278.80</b>
<b>Golf Tournament Expenses</b>	
Adver/Promo	25.00
Facilities	6,518.90
Other	624.14
Printing	61.59
Golf Tournament Expenses - Other	411.83
<b>Total Golf Tournament Expenses</b>	<b>7,641.46</b>
<b>Walk a thon Expenses</b>	
Adver/Promo	2,085.23
Balloons	207.78
Face painting	25.00
Facilities	178.00
Other	2,011.12
Printing	0.00
Silent Auction	232.27
T Shirts	3,096.06
tables/tents	2,476.46
Walk a thon Expenses - Other	-1,166.78
<b>Total Walk a thon Expenses</b>	<b>9,145.14</b>
<b>Total COGS</b>	<b>36,867.16</b>
<b>Gross Profit</b>	<b>84,065.34</b>
<b>Expense</b>	
<b>Adver/Promo-Community Awareness</b>	
Amys Blankets	64.47
General	451.33
Magazine	
Printing	808.71
<b>Total Magazine</b>	<b>808.71</b>
<b>Adver/Promo-Community Awareness - Other</b>	<b>53.01</b>
<b>Total Adver/Promo-Community Awareness</b>	<b>1,377.52</b>
<b>Bank Fees - Svc Chrgs</b>	<b>572.49</b>
<b>Business Fees-BBB/Corp Com/Othr</b>	<b>378.72</b>
<b>Card Processing Fees</b>	<b>1,212.24</b>
<b>Grants</b>	
Emergency Medical Fund	25.00
LFSA Cares - Assistance Program	1,325.06
Retreats	2,247.55
Scholarships	14,092.75
<b>Total Grants</b>	<b>17,690.36</b>
<b>Insurance</b>	
Business Owners Pers Prop/Liab	475.00
Director's Officers Liability	1,122.00
Worker's Comp	228.00
<b>Total Insurance</b>	<b>1,825.00</b>
<b>Lending Lib-Books/Subscriptions</b>	<b>545.44</b>



3:40 PM

02/28/18

Accrual Basis

## Lupus Fdtn. of Southern Arizona

## Profit &amp; Loss

October 2016 through September 2017

	Oct '16 - Sep 17
<b>Meals</b>	
Annual Meeting	405.06
Coffee Talk	27.70
<b>Total Meals</b>	432.76
<b>Office Equip-Noncapitalized</b>	632.67
<b>Office Expenses</b>	
Annual Meeting	28.67
Computers/IT	1,000.31
Equip Repair	336.86
Office Support	218.00
Supplies	3,107.35
Office Expenses - Other	380.79
<b>Total Office Expenses</b>	5,071.98
<b>Payroll Tax Expense</b>	2,092.93
<b>Postage-Office</b>	
Bulk Mail	215.00
Stamps	224.00
<b>Total Postage-Office</b>	439.00
<b>Printing-General Office</b>	16.74
<b>Prof Fees-Acctg/Legal/Othr</b>	1,000.00
<b>Rent</b>	8,614.80
<b>Telephone Expense</b>	2,260.47
<b>Utilities - water, gas, electri</b>	2,756.97
<b>Wages</b>	
Admin/Mngmt	11,180.35
Finance	3,548.00
Fundraising	6,927.80
Patient Services	2,008.45
Program	4,974.90
<b>Total Wages</b>	28,639.50
<b>Website Expenses - Web Hosting</b>	1,080.00
<b>Total Expense</b>	76,639.59
<b>Net Ordinary Income</b>	7,425.75
<b>Net Income</b>	7,425.75

**Lupus Fdtn. of Southern Arizona**  
**Balance Sheet**  
 As of September 30, 2017

	Sep 30, 17
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
Checking Account	36,481.79
Investment Account	31,620.62
Paypal Account	1,123.80
Savings Account	4,608.18
Square Inc.	-237.01
Total Checking/Savings	73,597.38
Other Current Assets	
Deposits	864.62
Inventory	2,593.06
Petty Cash	-43.12
Total Other Current Assets	3,414.56
Total Current Assets	77,011.94
Fixed Assets	
A/A Website Development	-6,912.00
Accum/Dep Equipment	-3,984.00
Accum/Dep Leasehold Improvemnts	-3,144.95
Equipment (office furn/equip)	3,984.00
Leasehold Improvements	3,144.95
Website Development	6,912.00
Total Fixed Assets	0.00
<b>TOTAL ASSETS</b>	<b>77,011.94</b>
<b>LIABILITIES &amp; EQUITY</b>	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Accrued Expenses	1,134.00
Deferred Revenue - Gala	18,975.00
Fica Payable	319.39
FIT Payable	-256.82
Payroll Liabilities	1,061.97
SIT Payable	62.17
Total Other Current Liabilities	21,295.71
Total Current Liabilities	21,295.71
Total Liabilities	21,295.71
Equity	
Fund Balance Restricted	670.76
Fund Balance Unrestricted	36,499.41
Unrestricted Net Assets	11,120.31
Net Income	7,425.75
Total Equity	55,716.23
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>77,011.94</b>