

GREAT THINGS HAPPEN

UNITED WAY

WHEN WE LIVE UNITED

**2016 ANNUAL REPORT**



# United Way of South Texas

## 2016 Board of Directors

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Board Chair  
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Lee Jones  
Past Board Chair  
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Alma Ortega-Johnson  
Campaign Co-Chair  
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Bob Tellez  
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Adrian Villarreal  
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International Bank of Commerce

Dr. Marla Guerra  
Fund Distribution & Education Council  
South Texas I.S.D.

Chris Julian  
Community Relations Chair  
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### Board Members

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Paola Escalante-Castillo  
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Jeanette Ahlenius  
Wayland Baptist University

Osly Licea  
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H-E-B

**United Way fights for the  
health, education, and financial stability  
of every person in every community.**

# A Message From The President

Thelma M. Garza, President

Doing more with less seems to be the norm. While fundraising in 2016 was challenging for most non profits, the United Way of South Texas does NOT lose sight of greater demands for meeting critical services in our two county area, Hidalgo and Starr. Our mission is: To improve lives by mobilizing the caring power of our community to advance the common good.

The United Way of South Texas Board of Directors ensures that all of the donors' dollars are invested in "real" relevant programs that demonstrate impact. We continue to move residents forward by aligning to the 4 focus areas: Education, Health, Financial Stability and Safety Net. Services from these focus areas (1) provide character building and after school programs that help youth become productive citizens (2) help lift people out of difficult situations, such as domestic violence and homelessness, and (3) help people be self-sufficient. For example, our transportation voucher program helps residents remain healthy and provides access to needed social services and job employment opportunities.

The Education Council is made up of representatives from 10 school districts. We discuss issues of concern and find solutions to obstacles that the student population faces. We have opened up food pantries at four school districts that lack access to food in their communities. We also provide each of these districts with a \$2,000 grant that social workers use to help students meet extenuating circumstances. This assistance helps keep the students in school.

This is one student's story of what the program did for him: David, a student at Edcouch-Elsa High School, was homeless and living on the streets, bouncing between homes of relatives and friends. "The help the school provides [because of United Way funding for food and grants for basic needs, such as clothing or gas money] has helped me stay in school," he said. David now looks forward to graduation and hopes to one day open his own mechanic shop. By helping students stay in school, we are impacting graduation rates and encouraging them to attend a technical program or participate in a certification program that will help them earn a living wage with an opportunity to advance.

The programs related to improving health focus on nutrition, regular exercises and physical activities. Many of these programs are provided by youth organizations in their after school programs. Improving eating habits and being more active can prevent serious health issues, such as obesity—which can lead to diabetes, heart disease and renal failure.

This year marks the 6th Anniversary of United Way of South Texas leading the Volunteer Income Tax Assistance (VITA) Program. Growth has been steady every year. In 2016, more than 400 volunteers (students and business professionals) were certified to prepare taxes. They helped 3,102 families get their income tax forms prepared at no cost (saving them \$465,300 in fees) and impacting the local economy by \$6.1 million in Hidalgo and Starr counties. Credit must be given to our partners, including non profits, schools, municipalities and our business community for the collaboration to make this happen. Furthermore, Financial Literacy is a new component to the program—encouraging savings accounts, basic budgeting and the importance of credit ratings.

Special thanks to our Board of Directors for their vision in leading this organization. Their keen sense of being responsive and relevant to community needs is an inspiration to our impact work.

We thank all our contributors, partner agencies, and volunteers who believe in our work and help us strive for a better tomorrow. Together we continue to LIVE UNITED.

# EDUCATION



## 11 High Schools

Alternate annually to receive school supplies for their Freshmen.

## Day of Caring

**3,300**

Freshmen receive basic school supplies through your support and with the help of 250 volunteers who package them.

## Drop-out Recovery & Food Pantries

Services and food baskets offered at up to eight school districts.

## Education Council

## "In Style" Shopping Spree

**120**

Middle school students return to school with new clothing because of your help.

**942**

Families benefit from Prenatal Education, Infant Stimulation, Toddlers Education, and Parenting Classes.

## Grants

Help counselors respond to student emergency needs at eight districts.

## Infant & After-School Programs

**185 Volunteers**

Assist students make the best selection of school attire (clothing valued at \$150 per child). Target also donates school supplies and free haircuts are available for students.

**38,558**

Students participate in after-school programs that focus on education and career development; leadership and character building; and health and fitness.

# HEALTH

## Child Advocacy & Counseling

**450**

Children who have been abused/neglected have a court-appointed advocate to speak on their behalf until placement in a safe environment or home.

**1,295**

Victims of child abuse participate in forensic interviews and mental health services they need with your support.

**\$1,012,637**

Savings on prescription medications.

## FamilyWize

**15,372**

FamilyWize discount prescription cards distributed to residents; Cards are free and are honored at many local pharmacies.

**9,870**

Children and adults participate in prevention program / treatment in Starr County.

## Transportation Vouchers

**45,792**

Free bus rides for individuals needing to keep medical appointments, pick-up prescriptions, attend job interviews/training, and secure emergency transportation to work. We partner with 46 agencies to distribute these bus vouchers to those without transportation.

**\$57,455**

Savings for clients in transportation costs.

## Substance Abuse Prevention/Counseling

**1,387**

Receive counseling and participate in support groups for alcohol or drug abuse.



# FINANCIAL STABILITY

**\$6,100,000**

Dollar amount returned to clients during the 2016 tax season.

**3,102**

Households earning \$54,000 or less received free income tax preparation services from I.R.S. certified volunteers.

## Financial Wellness & Employment Services

**526**

Families receive free budget, debt, or housing counseling, as well as consumer education.



**VITA**

(Volunteer Income Tax Assistance Program)

**\$465,300**

Amount saved by families in preparation fees and reinvested into the community.

## Entrepreneurship

This program educates Latina women on the process and resources needed to start their own business.

**LatinaHope**

## Income

LatinaHope encourages women to use their talent and skill to create profitable products.

# SAFETY NET

**16,209**

Families experiencing homelessness receive emergency shelter and hygiene kits.

## Emergency Shelter

**59,664**

Referrals to residents seeking social services and help meeting basic needs.

## Basic Needs

**5,798**

Victims of domestic violence seek shelter, transitional housing and/or counseling.

## Health & Life Skills

**100 Adults**

Participate in a Personal Social Adjustment Training program that teaches "soft skills," or life skills, needed to maintain employment.

**10,543**

Children learn health and life skills during their after school programs.

## Elderly/Disabled

Individuals are assisted with food, walkers, and/or rent assistance to help meet their basic needs.

**12,288**

Individuals benefit from Preparedness Health and Safety Training, Emergency Assistance (for members of Armed Forces), and Disaster Services.

## Hot Meals

Provided to those experiencing hunger and/or homelessness in Hidalgo County. Meals to clients and visiting family members are also provided at end-of-life care center.

# Volunteer Leadership

Alma Ortega-Johnson, Campaign Co-Chair  
Wells Fargo

Bob Tellez, Campaign Co-Chair  
H-E-B



## Loaned Executives

Rolando Ayala, Lone Star National Bank  
Emigdio Cahue, H-E-B  
Robert Chamberlain, Security Service FCU  
Rosalba Epps, AEP Texas  
Eddie Garza, Wells Fargo  
Ventura Hinojosa, Starr County  
Chris Lash, City of McAllen  
Mayra Lopez, Wells Fargo  
Cesar Martinez, Inter National Bank

Christian Martinez, Navy Army CCU  
Celia Mejia, Lone Star National Bank  
Criselda Moncayo, Inter National Bank  
Delia Perez, Starr County  
Karen Pittman, International Bank of Commerce  
Adriana Rendon, Boys & Girls Clubs of Edinburg  
Elizabeth Rivera, Boys & Girls Club of Pharr  
Cesar Rodriguez, City of McAllen

The work ethic and passion of our Campaign Volunteer Leadership is inspiring. We commend all Campaign volunteers for their dedication and countless hours of work. United Way funds 21 partner agencies and over 100 programs. The community's support is essential to our ability to assist these important agencies. In 2016, over 265,424 residents in Hidalgo & Starr Counties were impacted by a United Way funded agency or program. This represents almost 30% of the population.





Volunteers from Plains Capital Bank (above) and H-E-B (below) with students at the "In Style" Back to School Shopping Spree.





# TOP 10 COMPANIES

1. H-E-B Stores & Distribution Facility
2. Walmart & Sam's Stores
3. United Parcel Service (UPS)
4. Inter National Bank (INB)
5. GE Aviation
6. Target Stores
7. City of McAllen
8. South Texas Health System
9. International Bank of Commerce (IBC)
10. Hidalgo County







# TOP SCHOOL DISTRICTS

## Golden Apple Awards Top 5 District Contributors

- |                      |                     |
|----------------------|---------------------|
| 1) Edinburg C.I.S.D. | 4) Mission C.I.S.D. |
| 2) McAllen I.S.D.    | 5) La Joya I.S.D.   |
| 3) PSJA I.S.D.       |                     |

## Highest Per Capita Campus & Department

**La Union Elementary**  
**Rio Grande City C.I.S.D.**  
**Special Education Department**  
**Edcouch-Elsa I.S.D.**

## Highest Per Capita Districts

**South Texas I.S.D.**  
 (under 999 Employees)

**Mission C.I.S.D.**  
 (2000-2999 Employees)

**Mercedes I.S.D.**  
 (1000-1999 Employees)

**McAllen I.S.D.**  
 (over 3000 Employees)



# PILLAR CLUB

## Member Companies

The Pillar Club represents donors who contribute a minimum of \$500 annually. Their gift represents their trust in United Way, to create better paths and opportunities for individuals in our community. There were approximately 870 Pillar Club Members in 2016. Thanks to you and to all who invest in United Way of South Texas.

Accenture  
AEP Texas  
AT&T  
Bank of America  
BBVA Compass  
Boy Scouts of America, Rio Grande Council  
Boys and Girls Club of Edinburg  
Boys and Girls Club of Pharr  
Brightwood College  
Burton McCumber & Cortez, LLP  
Children's Advocacy Center  
Citizens State Bank  
City of Alton  
City of Donna  
City of Edinburg  
City of Hidalgo  
City of McAllen  
City of Mercedes  
City of Mission  
City of Pharr  
City of Rio Grande City  
City of Roma  
City of San Juan  
City of Weslaco  
Coca Cola  
Combined Federal Campaign (CFC)  
Costco  
COSTEP  
Delphi  
Design & Development Institute  
Dillard's  
Duke Energy  
Edcouch - Elsa I.S.D.  
Edinburg C.I.S.D.

Edwards Abstract & Title Co.  
Elsa State Bank  
Enterprise Rent-A-Car  
FedEx  
GE Aviation  
H-E-B - Alamo  
H-E-B - Donna  
H-E-B - Edinburg - Freddy Gonzalez  
H-E-B - McAllen - N. 10th St.  
H-E-B - McAllen - Pecan Blvd.  
H-E-B - McAllen - Trenton  
H-E-B - Mercedes  
H-E-B - Mission - Conway  
H-E-B - Mission - Griffin Parkway  
H-E-B - Mission - Shary Rd.  
H-E-B - Palmhurst  
H-E-B - Palmview  
H-E-B - Pharr  
H-E-B - Regional Office  
H-E-B - Rio Grande City  
H-E-B - San Juan  
H-E-B - Transportation  
H-E-B - Weslaco - Texas Blvd.  
H-E-B - Weslaco - Westgate Dr.  
Hidalgo County  
Hidalgo County Head Start  
Hidalgo County Pct. 2 Pharr  
Hidalgo I.S.D.  
Hobart  
Holt  
IBM  
International Bank of Commerce (IBC)  
Inter National Bank (INB)  
International Paper Company

JCPenney - Edinburg  
 Johnson Controls  
 Knapp Medical Center  
 KRGV TV 5  
 La Joya I.S.D.  
 Law Office of Hilda Gonzalez Garza, PLLC  
 Law Office of Judith A. Solis, PLLC  
 Lone Star National Bank  
 Magic Valley Electric Co-op  
 Manpower Group  
 Mayfair Properties, LLC  
 McAllen Chamber of Commerce  
 McAllen I.S.D.  
 Mercedes I.S.D.  
 Mission C.I.S.D.  
 Monte Alto I.S.D.  
 Navy Army CCU  
 Nuestra Clinica Del Valle  
 NuStar Energy  
 OXY Petroleum  
 Petroleum Solutions  
 Pioneer Hi-Bred  
 Pharr-San Juan-Alamo I.S.D.  
 Plains Capital Bank  
 Region One ESC  
 Rio Grande City C.I.S.D.  
 S & B Infrastructure  
 Security Service Federal Credit Union  
 Serving Children and Adults In Need (SCAN)  
 Sharyland I.S.D.  
 Shepard Walton King Insurance Group  
 South Texas GMC  
 South Texas Health System

South Texas I.S.D.  
 Sprint PCS  
 State Employee Charitable Campaign (SECC)  
 Starr County  
 Starr County Hospital  
 Target - Las Tiendas  
 Target - N. 10th St.  
 Target - Nolana Ave.  
 Target - Mission  
 Target Regional Office  
 Texas Gas Service  
 Texas National Bank  
 Texas Regional Bank  
 The Monitor  
 The Salvation Army  
 Tropical Texas Behavioral Health System  
 United Parcel Service (UPS)  
 UPS Supply Chain Solutions  
 United Way of South Texas  
 Valley Land Title  
 Valley Town Crier  
 Vantage Bank  
 Vaughan Interests, Inc.  
 Walmart-Rio Grande City  
 Wayland Baptist University  
 Wells Fargo  
 Weslaco I.S.D.  
 Jeanette Ahlenius  
 Jim & Joyce Deuser  
 Manolo Garibay  
 Santos Ramirez



Pictured above are "Super Youth" members from the Starr County Youth Coalition at Rio Grande City CISD. This coalition is affiliated with Serving Children and Adults in Need (SCAN).



# Fund Distribution Volunteers



## FUND DISTRIBUTION VOLUNTEERS:

Dr. Marla Guerra, South Texas I.S.D., Chair  
Fito Mercado, University of Texas - RGV, Co-Chair

Approximately 34 volunteers were part of the Audit, Program, Facilities and Outcome review process.

They represented the following companies:

AEP Texas

BBVA Compass Bank

Burton McCumber & Cortez LLP

Chase Bank

City of McAllen

City Of Weslaco

Elsa State Bank

Frost Bank

H-E-B

Infinity Auto Insurance

Inter National Bank

JP Morgan Chase Bank

Lone Star National Bank

Mission CISD

Navy Army Community Credit Union

Sam's Club

Security First Credit Union

Target

Texas Regional Bank

The Monitor

Universal Pawn

UT-RGV

Veteran's Administration

Walmart

# Volunteer South Texas



Over 115 agencies have registered on the free online portal:  
[volunteersotx.org](http://volunteersotx.org).

275 volunteers participated in Volunteer South Texas Week in 2016  
and contributed 864 hours towards projects benefiting  
24 different agencies.

Their time amounted to almost \$20,000 in economic value.

Register to volunteer or sign up your agency on Volunteer South  
Texas. Call United Way of South Texas at 956.686.6331  
if you have any questions.



United Way of South Texas is responsible for administering, providing all support staff and training hundreds of volunteers for unique projects.  
Our work adds value and ensures accountability.

- Combined Federal Campaign (CFC) - completed 21 years of administering the RGV-CFC in 2016; managed employee giving campaign for RGV Federal employees; raised **\$986,000** during the 2016 Campaign.

- Emergency Food & Shelter Program (EFSP formerly FEMA) – administered distribution of over **\$600,000** in federal funds for food and shelter programs in Hidalgo, Starr and Zapata Counties. EFSP designations vary annually depending on federal funding availability.

- State Employee Charitable Campaign (SECC) – managed employee giving campaign for RGV State employees. Raised **\$208,000** during the 2016 Campaign.

As donors become more involved with United Way, they recognize that United Way is the only local non-profit organization with the capacity to affect individuals from birth to end-of-life. Our footprint in the local community is the largest and the most impactful. Recipients of United Way funding are carefully reviewed for accountability by dedicated volunteers.

#### Education Council

Dr. Guerra, Superintendent of South TX I.S.D., also leads an energetic group of 21 educators who represent United Way's Education Council. Their goal is to identify crucial needs that are faced by students who live in severe poverty, in particular, those working to earn their High School Diploma. The team has approved UW grants to:

- Offer emergency grants to students who face emergency needs
- Fund food pantries at some school districts

#### Council Members represent:

1. Edcouch-Elsa I.S.D.
2. Edinburg C.I.S.D
3. La Joya I.S.D.\*
4. McAllen I.S.D.
5. Monte Alto I.S.D.\*
6. PSJA I.S.D
7. Rio Grande City C.I.S.D.\*
8. Roma I.S.D.\*

\*Food Pantries funded by United Way through your generous support.



Walmart partners with United Way in its annual Back-To-School drive to benefit various school districts. Last year, Sharyland ISD (student representatives pictured above) was one of the recipients of the drive.

# Statement of Cash Receipts and Disbursement For the Year Ended December 31, 2015

## Statement of Cash Receipts and Disbursement For the Year Ended December 31, 2015

Receipts	
Collected Campaign Pledges	\$2,651,325
Admin CFC/SECC	\$118,944
Investment Income	\$5,733
Designated Gifts	\$1,342
Grants	\$41,236
In Kind Donations	\$152,133
	\$2,970,713
Disbursements (Direct Investments to Community)	
Distribution to Partner Agencies	\$1,303,848
Community Impact Grants	\$292,000
SECC/CFC/EFSP Costs	\$118,944
*Program/Community Projects Costs	\$255,339
*Campaign Investments Costs	\$516,050
Emergency Grants	\$40,000
	\$2,526,181
Other Disbursements (Indirect Investment to Community)	
Administrative Costs	\$399,679
Net Contribution to Cash	\$45,351

\*Program/community project costs include: Designated Gifts, In-Style Shopping, Drop-out Prevention/Education Council. Transportation Vouchers and Volunteer Income Tax Assistance Program (VITA).

\*Campaign Investments Includes: 152,000 In-Kind services  
All figures based on 2015 Audit.

United Way of South Texas does not charge agencies any fee in return for their allocation and other services rendered.

# Our Partner Agencies

American Red Cross  
Iris Martinez-Juergens

Aurora House  
Kathy Scheuerman

Boy Scouts Rio Grande Council  
Rudy Gonzalez

Boys & Girls Club of Alamo/San Juan  
Lyle Skaggs

Boys & Girls Club of Edinburg  
Sabrina Walker-Hernandez

Boys & Girls Club of McAllen  
Dalinda Gonzalez-Alcantar

Boys & Girls Club of Mission  
Luduvico Martinez

Boys & Girls Club of Pharr  
Freddy Mata, Jr.

CASA of Hidalgo County  
Diana Almaguer

Children's Advocacy Center  
Victoria Medina

Community Council of the RGV  
Abby Torre

Girls Scouts of Greater So. TX  
Lea Peacock

Green Path, Inc.  
Sara Gilbert

Goodwill Industries of So. TX.  
John W. Owen

Hidalgo Youth Center  
Jaime Gaona

Mercedes Recreation Center  
Richard Morin

Palmer Drug Abuse Program  
Nadia Ochoa

Serving Children & Adults in Need  
Sandra Garza

Silver Ribbon Community Partners  
Janie Maldonado

Starr Co. Victims of Domestic Violence  
Delia Perez

Su Casa De Esperanza  
Lucy Fernandez

The Salvation Army  
Captain Luis Melendez

Women Together  
Estella De Anda

*United Way invests in and administers these programs. However, United Way Staff are not involved in the selection of any of the recipients.*

## 2016 Community Impact Grants

Day of Caring

The Education Council

"In Style" Shopping Spree

LatinaHope

Starr County Programs

Transportation Vouchers

Volunteer Income Tax Assistance

# *We Thank You For Your Support!*

## Staff

Thelma M. Garza  
President

Lilly Lopez-Killelea  
Vice-President  
Resource Development Director

Amelia Rojas  
Outcome Specialist

Eloise Montemayor  
Community Relations  
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Eslibeth Perez  
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Marlen Ramirez  
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