

LIVE UNITED

2018 ANNUAL REPORT



United Way of South Texas 2018 Board of Directors

EXECUTIVE COMMITTEE

Lee Jones
Board Chair
AEP Texas

Alma Ortega-Johnson
Past Board Chair
Wells Fargo

Bob Tellez
Strategic Planning
H-E-B

Edna Garcia
Finance Co-Chair
Security Service Federal Credit Union

Tyler Stone
Finance Co-Chair
RIOCO

Lisa Killion
Campaign Chair
South Texas Health System

Chris Julian
Community Relations Chair
Advertiser

Fito Mercado
Fund Distribution Co-chair
UTRGV

Paola E. Castillo
Fund Distribution Co-chair
Frost Bank

BOARD MEMBERS

Jeanette Ahlenius
Wayland Baptist University

Michael Leo
City of Palmview

Elvira I. Alonzo
City of McAllen

Osly Licea
Texas State Comptroller's Office

Lisa Garza
DHS-RGV Sector USBP

Blanca I. Villalobos
IBC Bank

Larry C. Gonzalez
Plains Capital Bank

STAFF

Thelma M. Garza
President

Eslibeth Perez
Special Programs Coordinator

Lilly Lopez-Killelea
Vice-President
Resource Development Director

Marlen Ramirez
Data Entry Specialist

Maria Flores
Community Investment Specialist

Evangelina Scheffler
Administrative Assistant

Eloise Alvizo
Community Relations
Public Sector Associate

A Message From The President

We have so many accomplishments to be proud of! First of all, our volunteer base grows every year in every function of our United Way. The number of Volunteer Income Tax Assistance (VITA) Program volunteers increased this year by 35 tax preparers. In addition to the increased number of VITA volunteers, we experienced an increase in the number of families served at the South Texas College (STC) VITA site. STC moved their site to the Pecan campus and doubled the number of families assisted and the dollars returned to customers.

In addition to this great news, the City of McAllen Transit Department is supporting our Transportation Voucher Program dollar-for-dollar, up to \$30,000 for the next three years! We will help more individuals seek employment, keep medical appointments and access important health and human services. The benefits to thousands of families is beyond measure.

Furthermore, the Board of Directors recommended investing funds for additional grants to specific programs through the Education Council. The Education Council re-opened much needed food pantries in select school districts: Roma I.S.D., Edcouch-Elsa I.S.D., and La Joya I.S.D. The amount invested towards improving the quality of life for students in these districts is \$13,000.

Also, the United Way of South Texas implemented a United Way Youth Leadership Program in two high schools at Weslaco I.S.D. High school social workers dedicate time to encourage high school juniors to mentor high school freshmen. With facilitation from United Way staff, the mentors present topics centered around financial literacy, ethics, civic duty, leadership and volunteer opportunities. Students' activities include field trips, projects and quality time as mentors. Each high school designs a unique approach to accomplishing the same goal.

What an amazing year...and career! After 33 years of being a United Way professional, I have decided to retire. It has been a rewarding experience to work with such a dedicated Board of Directors and an amazing staff. Now, it is time to pass the gavel to the next leader and to give myself an opportunity to shift focus from work to family, friends and new beginnings. Thank you for your support!

Thelma M. Garza

On November 15, 2018, Thelma Garza announced her retirement, effective March 29, 2019. The entire Board of Directors and Staff wish her a happy and healthy retirement. (Pictured left) Board Members at the United Way of South Texas 2018 Campaign Awards Ceremony. Standing left to right, Fito Mercado, Lee Jones, Robert Rosell, D'uAndre Drain, Edna Garcia, Lisa Garza, Elvira Alonzo, Jeanette Ahlenius, Larry C. Gonzalez, Tyler Stone. Seated left to right: Lisa Killion, Blanca I. Villalobos, Thelma Garza, Alma Ortega-Johnson, and Paola E. Castillo.





MISSION

To improve lives by mobilizing the caring power



PILLAR CLUB MEMBER COMPANIES

United Way ensures accountability of the contributions that employees give through their company—also making sure to maximize the investment and create the greatest impact. The Pillar Club represents donors who contribute a minimum of \$500 annually. Their gifts represent their trust in United Way to help create better paths and opportunities for individuals in our community. There were approximately 769 Pillar Club Members in 2018. Thanks to you and to all who invest in United Way:

AEP Texas
American Red Cross South Texas Chapter
AT&T
Aurora House Foundation
BBVA Compass Bank
BMO Financial Group
Boys and Girls Clubs of Edinburg
Boys and Girls Club of Pharr
Burton McCumber & Longoria, L.L.P.
Children's Advocacy Center

City of Donna
City of Edinburg
City of Hidalgo
City of McAllen
City of Mission
City of Palmview
City of Pharr
City of Rio Grande City
City of Roma
City of San Juan

City of Weslaco
Costco
Design & Development Institute
Dillard's
Edinburg C.I.S.D.
Edwards Abstract & Title Co
Enterprise Rent-A-Car
Federal Express - McAllen
Fox Packaging Co.
Frost Bank



of our community to advance the common good.

GE Aviation
Greater State Bank
H&R Block
H-E-B Stores and Distribution Facilities
Hidalgo County and H.C. Precincts 1-4
Hobart
Holt Company of Texas
IBC Bank
International Paper Company
JPMorgan Chase
Knapp Medical Center
KRGV TV 5
La Joya I.S.D.
Law Office of Hilda Gonzalez Garza, PLLC
Lone Star National Bank
Magic Valley Electric Co-op
Manpower
Mayfair Properties, LLC
McAllen Chamber of Commerce
McAllen I.S.D.

Mercedes Housing Authority
Mercedes I.S.D.
Mission C.I.S.D.
Monte Alto I.S.D.
Navy Army CCU
Nuestra Clinica Del Valle
NuStar Energy, L.P.
Pharr-San Juan-Alamo I.S.D.
Plains Capital Bank
Region One ESC
Rexnord
Rio Grande City C.I.S.D.
Roma 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 Health System
South Texas I.S.D.

State Employee Charitable Campaign (SECC)
Starr County
Starr County Hospital
Su Casa de Esperanza
Superior Health-Centene
Target Stores
Texas National Bank
Texas Regional Bank
The Monitor
The Salvation Army
United Parcel Service (UPS)
United Way of South Texas
US - DHS CBP OBP
Valley Land Title
Vantage Bank Texas
Walmart Stores/Sam's Club
Wayland Baptist University
Wells Fargo
Weslaco I.S.D.
Zachry Construction Corporation

CAMPAIGN

Lisa Killion, Campaign Chair
South Texas Health System

LOANED EXECUTIVES:

Lizzeth Aguilar, Vantage Bank Texas
Joanna Alvarez, IBC Bank
Abel Carbajal, City of McAllen
Robert Chamberlain, Security Service FCU
Angelo Di Martino, Wells Fargo
Rosalba Epps, AEP Texas
Alba Escobedo, Boys & Girls Clubs of Edinburg
Kay Garza, Wells Fargo
Erika George, Wells Fargo
Ventura Hinojosa, Starr County
Mayra Jasso, Wells Fargo
Edwardo Lopez, City of McAllen
Evelyn Lopez, IBC Bank
Nancy Pena, IBC Bank
Delia B. Perez, Starr County
Polo Prado, IBC Bank
Elizabeth Rivera, Boys & Girls Club of Pharr
Jennifer Sanchez, IBC Bank
Juliana Treviño, Vantage Bank Texas

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. The support of these volunteers and their companies are instrumental in the success of our Annual Campaign, which funds over 21 non-profit agencies and over 100 programs that meet critical needs of residents in Hidalgo and Starr Counties.



(Pictured above) 2018 Loaned Executives at training with Board Chair Edna Garcia, Security Service Federal Credit Union, and Campaign Chair Lisa Killion, South Texas Health System.

TOP 10 COMPANIES

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

Our Top 10 Supporting Companies (pictured to the left) raised over \$972,300 for United Way programs. This amount represents 43% of the overall campaign. We appreciate all companies and employees for their contributions.

TOP SCHOOL DISTRICTS

Golden Apple Awards Top 5 District Contributors

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

Highest Per Capita Districts

Monte Alto I.S.D. (under 999 Employees)	Rio Grande City C.I.S.D. (2000-2999 Employees)
Roma I.S.D. (1000-1999 Employees)	La Joya I.S.D. (over 3000 Employees)

Highest Per Capita Campus & Department

Gonzalez Elementary – McAllen I.S.D.
Administration Office – Roma I.S.D.

We thank all School Districts in Hidalgo & Starr Counties for their contributions--24% of the total campaign.



TOP 10 COMPANIES



GOLDEN APPLE SCHOOL DISTRICTS



**COMPANY COORDINATOR OF THE YEAR
D'UANDRE DRAIN, GE AVIATION**



**DISTRICT COORDINATOR OF THE YEAR
MARISSA E. SAENZ, LA JOYA I.S.D.**



**2019 SOUTH TEXAS HERO
COMMISSIONER EDUARDO "EDDIE" CANTU**

SOUTH TEXAS HERO AWARD

The United Way of South Texas Board of Directors recognized Commissioner Eduardo "Eddie" Cantu with the South Texas Hero Award. The Award was established in 2008 in honor of Mr. Ray Alexander, who served as General Manager for KRGV TV 5 for 28 years. Ray served on the United Way Board and was instrumental in helping to establish the local "211" Information and Referral Services in the Rio Grande Valley. Much like Alexander was, Cantu is a passionate Champion of United Way. In addition to helping lead one of the most successful Campaigns at Hidalgo County, he challenged his peers to join him in supporting the cause. With his leadership and support from the Judge's Office, Hidalgo County had a 30% increase. Cantu serves on numerous community boards, including the Boys & Girls Club of Pharr and the PSJA Education Foundation.

FUND DISTRIBUTION VOLUNTEERS

Fito Mercado, University of Texas - RGV, Co-Chair

Paola E. Castillo, Frost Bank, Co-Chair

Approximately 45 volunteers were part of the Audit, Program, Facilities and Outcome review process.

They represented the following companies:

Advertir, Inc.
AEP Texas
Aptiv
Burton McCumber & Longoria, LLP
Chase Bank
City of McAllen
City of Pharr
City Of Weslaco
Elsa State Bank
Enterprise Rent-A-Car
Frost Bank
H-E-B

Hidalgo County Court #6
IBC Bank
JP Morgan Chase Bank
Mission Cisd
Navy Army Community Credit Union
Sam's Club
Target
The Monitor
US Border Patrol
UT-RGV
Walmart
Wells Fargo

Fund Distribution volunteers thoroughly review applications, financial audits and make on-site visits-all with one goal in mind: to ensure that our supporters are making the best "choice" when they give to United Way. We treat every donor dollar, as our own!



JIMMY RAMIREZ, VITA CLIENT

After Jimmy Ramirez was diagnosed with Non-Hodgkin's Lymphoma in 2016 he was unable to work for two years. Unable to afford a paid tax preparer, he sought help from United Way's Volunteer Income Tax Assistance (VITA) Program.

"Keep supporting this program. It does help a lot of people," said Ramirez. "There's a lot of us that are financially challenged. Thank you to VITA and to their supporters who make all this possible."

OUR PARTNER AGENCIES

American Red Cross, South Texas Chapter
Aurora House Foundation
Boy Scouts Rio Grande Council
Boys & Girls Clubs of Edinburg
Boys & Girls Club of McAllen
Boys & Girls Club of Mission
Boys & Girls Club of Pharr/San Juan
CASA of Hidalgo County
Children's Advocacy Center of Hidalgo County
Community Council of the RGV
Girls Scouts of Greater South Texas

Green Path, Inc.
Goodwill Industries of South Texas
Hidalgo Youth Center
Mercedes Recreation Center
Palmer Drug Abuse Program
Serving Children & Adults in Need
Silver Ribbon Community Partners
Starr County Victims of Domestic Violence
Su Casa De Esperanza
The Salvation Army
Women Together

United Way of South Texas invests in the programs administered by the agencies listed above. United Way Staff help to facilitate the fund distribution process. However, the Board of Directors ultimately determines the selection of the recipients.

United Way Programs

Back to School "In Style" Shopping Spree
Day of Caring
FamilyWize (Prescription Discount Cards)
LatinaHope
Starr County Family Support Programs
The Education Council
Transportation Vouchers
Volunteer Income Tax Assistance Program
United Way Youth Leadership Program

2017-2018 Community Impact Grants

Comfort House
Habitat for Humanity of the RGV
South Texas Juvenile Diabetes Association
Valley AIDS Council

DAY OF CARING PROJECT "FRESHSTART"

United Way of South Texas started Project "Freshstart" in 2011 to provide school supplies for high school Freshmen. Since the start of this project, UWST has invested \$211,777 for 25,600 Freshmen across 18 school districts in Hidalgo and Starr Counties. More than 180 volunteers from various companies, schools, agencies, and govt. entities gather together on one single morning to assemble the bags of school supplies.



IMPACT IN 2018

United Way of South Texas funds over 100 programs that address Health, Education, Financial Stability and Safety Net. We are the only local organization with the capacity to affect individuals from birth to end-of-life, resulting in the largest and most impactful non-profit footprint in our two-county service area. Over 220,000 residents in Hidalgo and Starr Counties benefited from a United Way-funded program in 2018:

HEALTH

\$216,786

saved in reduced prescription costs for **2,950** residents through our partnership with Family-wize. Discount prescription cards are free and honored at participating local pharmacies.

15,395

individuals received free child and family violence counseling, end-of-life care family support and more.

1,813

children and adults received counseling and participated in support for alcohol or drug abuse.

FINANCIAL STABILITY

\$6.8 Million

in refunds for **4,437** families who received free income tax preparation services valued at **\$887,400**.

1,159

individuals with disabilities or other barriers to employment received employment services.

32,411

transportation vouchers distributed to individuals without transportation. Access to public transportation helps these clients attend job interviews/training, secure emergency transportation to work, receive support services, keep medical appointments, etc.

EDUCATION

36,556

youth received after-school care, homework assistance and benefited from education and career development, health and fitness, and leadership and character-building programs.

\$18,000

invested in **120** middle school students for new clothing and hygiene items.

3,300

Freshmen received basic school supplies with your support and with the help of **250** volunteers who packaged them.

SAFETY NET

35,659

referrals to residents who sought social services and help meeting basic needs.

5,544

individuals benefited from preparedness health and safety training, emergency assistance (for members of Armed Forces) and disaster services.

24,294

families experiencing homelessness and/or domestic violence received one or more of the following services: emergency shelter, hot meals, hygiene kits, transitional housing, and counseling.

Education Council – Represented by eight school districts (Edcouch-Elsa I.S.D., La Joya I.S.D., McAllen I.S.D., Mercedes I.S.D., Monte Alto I.S.D., Rio Grande City C.I.S.D., Roma I.S.D., and Weslaco I.S.D.) and 14 educators to identify crucial needs of students, offer emergency grants and fund food pantries.

Emergency Food & Shelter Program (EFSP formerly FEMA) – Administered distribution of over \$621,002 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 \$196,631 during the 2018 Campaign.

Volunteer South Texas – Administered by United Way of South Texas. Over 150 agencies have registered on the free online portal: volunteersotx.org. Register to volunteer or sign up your agency on Volunteer South Texas.

Statement of Cash Receipts & Disbursement For the Year Ended December 31, 2017

Receipts

Collected Campaign Pledges	\$2,161,822
Admin Fees CFC/SECC	\$25,073
Investment Income	\$4,894
Designated Gifts	\$6,754
Grants	\$94,120
In Kind Donations	\$167,871
	\$2,460,534

Disbursements (Direct Investments to Community)

Distribution to Partner Agencies	\$1,296,848
Community Impact Grants	\$69,500
SECC/CFC/EFSP Costs	\$25,073
Program/Community Projects Costs	\$316,570 ¹
Campaign Investments Costs	\$354,478 ²
Emergency Grants	\$18,000
	\$2,080,469

Other Disbursements (Indirect Investment to Community)

Administrative Costs	\$297,212
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Net Contribution to Cash	\$82,853
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United Way of South Texas does not charge agencies any fee in return for their allocation and other services rendered.

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

2) Campaign Investments Includes: 167,871 In-Kind services. All figures based on 2017 Audit.

3) 2018 Audit figures are pending.



United Way of South Texas
Serving Hidalgo and Starr Counties

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