



# MAKE A DIFFERENCE

**2017 ANNUAL REPORT**



United Way of South Texas  
Serving Hidalgo and Starr Counties



# United Way of South Texas 2017 Board of Directors

## Executive Committee

**Alma Ortega-Johnson**  
Board Chair  
Wells Fargo

**Edna Garcia**  
Past Board Chair  
Security Service FCU

**Lee Jones**  
Strategic Planning  
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**Adrian Villarreal**  
Finance Co-Chair  
International Bank of Commerce

**Tyler Stone**  
Finance Co-Chair  
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**Bob Tellez**  
Campaign Co-Chair  
H-E-B

**Ismael Moran**  
Campaign Co-Chair

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

**Chris Julian**  
Community Relations Chair  
Advertis

## Board Members

**Jeanette Ahlenius**  
Wayland Baptist University

**Michael Leo**  
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**Elvira I. Alonzo**  
City of McAllen

**Osly Licea**  
South Texas College

**Paola Escalante-Castillo**  
Frost Bank

**Fidencio Mercado**  
University of Texas - Rio Grande Valley

**Lisa Garza**  
DHS-RGV Sector USBP

**Chris Von Wald**  
The Monitor

# A Message From The President

Thelma M. Garza, President

In spite of difficult economic times, we stayed focused on the importance of programs and services needed by our residents. 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 programs that demonstrate impact. We continue to move residents forward by aligning our investments to four focus areas: Education, Health, Financial Stability, and Safety Net. Services from these areas: provide character building and after school programs that help youth become productive citizens, help lift people out of difficult situations, such as domestic violence and homelessness, and help people be self-sufficient.

To name one critical service, the Transportation Voucher Program helps residents remain healthy and provides access to needed social services and job employment opportunities. Residents are able to keep medical appointments, preventing hospitalizations. Individuals are able to look for employment opportunities, and/ or attend training sessions to gain employment. With the help of the vouchers, residents can access social service agencies for needed programs which helps them remain self sufficient.

The Education Council is made up of representatives from eight school districts. They focus on issues of critical concern and find solutions to obstacles that students face every day. We provide these districts with a \$2,000.00 grant that social workers use to help students meet extenuating circumstances, and ultimately keep the students in school. This year, we launched a leadership Pilot Program at Weslaco ISD with 100 Juniors. The success of the program was in part due to the mentoring component that allowed students to share valuable personal lessons and experiences. After six weeks of informational sessions, these Juniors were matched with Freshmen. The teams spent time together, engaging in conversations about involvement in school activities and in the community through volunteerism. Both groups demonstrated a need to connect and to share similar experiences. Several of the mentors also shared the following, "we felt empowered and proud of our relationships with the mentees and we are certain that our paths would never have crossed without this opportunity."

The programs related to improving health include classes on nutrition and the importance of physical activities. Ten partner agencies have a variety of sessions on these two topics, some include simple cooking classes to encourage healthy eating. The goal is to educate our youth on maintaining a healthy lifestyle which can prevent serious health issues, such as obesity—which can lead to diabetes, heart disease and renal failure.

This year marks the 7th Anniversary of United Way of South Texas leading the Volunteer Income Tax Assistance (VITA) Program. Growth has been steady every year. In 2017, more than 365 volunteers (students and business professionals) were certified to prepare taxes. They helped 4,410 families get their income tax forms prepared at no cost (saving them \$882,000 in fees) and impacting the local economy by \$7,946,504 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.

We thank our Board of Directors, our contributors, partner agencies, and volunteers who believe in our work and help us strive for a better tomorrow. Their commitment inspires us to "LIVE UNITED."

# United Way fights for the Health, Education, and Fin



Over **28,600** individuals learned about healthy eating habits and food preparation skills in 2017 through a United Way funded program. (Pictured above) Just Energy Sustainable Garden at Weslaco I.S.D. Justice Raul A. Gonzalez Elementary School—a collaborative project with Just Energy Foundation and Habitat for Humanity.

## HEALTH

**\$193,819**

saved in reduced prescription costs for **2,416** residents through our partnership with Familywize. Discount prescription cards are free and honored at participating local pharmacies.

**28,647**

individuals learned healthy eating habits and food preparation skills.

**17,798**

children and adults received free child and family violence counseling, addiction counseling, bereavement counseling and more.

**1,388**

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

## EDUCATION

**38,338**

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 through your support and with the help of **250** volunteers who packaged them.

**995**

families benefited from prenatal and toddlers education, infant stimulation and parenting classes.



# Financial Stability of every person in every community.

## FINANCIAL STABILITY

**\$7.9 Million**

in refunds for 4,410 families who received free income tax preparation services valued at \$882,000.

**59,788**

Free bus rides for individuals who needed 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.

**373**

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

**1,031**

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



Transportation Voucher Client and Veteran



Volunteer Income Tax Assistance (VITA) Program Volunteers & Clients

## SAFETY NET

**12,288**

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

**19,325**

Families experiencing homelessness received emergency shelter and hygiene kits.

**4,571**

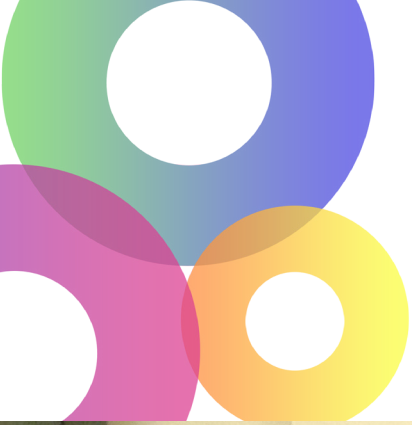
Victims of domestic violence seek shelter, transitional housing and/or counseling.

**46,150**

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



Back to School "In Style" Shopping Spree. Volunteer Elodia De La Garza, INB, with Sharyland I.S.D. student.



# VOLUNTEER LEADERSHIP

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

**Ismael Moran, Campaign Co-Chair**



## Loaned Executives

- Elisa Beas**, City of Rio Grande City
- Emigdio Cahue**, H-E-B
- Alex Cardenas**, Wells Fargo
- Robert Chamberlain**, Security Service FCU
- Rosalba Epps**, AEP Texas
- Cynthia A. Gonzalez**, City of McAllen
- Laura Hernandez**, H-E-B
- Ventura Hinojosa**, Starr County
- Mayra Jasso**, Wells Fargo

- Claudia Johnson**, Navy Army CCU
- Jessica Reyna**, Inter National Bank
- Criselda Moncayo**, Inter National Bank
- Delia Perez**, Starr County
- Nathaniel Pena**, Boys & Girls Clubs of Edinburg
- Noel Perez**, Magic Valley Electric Co-op
- Jennifer Sanchez**, IBC Bank
- Elizabeth Rivera**, Boys & Girls Club of Pharr
- Benjamin Worsham**, 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 22 partner agencies and over 100 programs. The community's support is essential to our ability to assist these important agencies. In 2017, over 226,300 residents in Hidalgo & Starr Counties were impacted by a United Way funded agency or program. This represents almost 27% of the population.



# TOP 10 COMPANIES

Our Top 10 Supporting Companies alone 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.

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



Top 10 Companies



Campaign Coordinator of the Year  
David Perales, H-E-B



Golden Apple Award Recipients



Highest Per Capita Districts



District Coordinator of the Year  
Susan Peterson, Weslaco I.S.D.

# TOP SCHOOL DISTRICTS

## Golden Apple Awards Top 5 District Contributors

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

## Highest Per Capita Districts

- South Texas I.S.D.**  
(under 999 Employees)
- Edcouch-Elsa I.S.D.**  
(1000-1999 Employees)
- Mission C.I.S.D.**  
(2000-2999 Employees)
- McAllen I.S.D.**  
(over 3000 Employees)

## Highest Per Capita Campus & Department

- Carmen Elementary**  
Pharr-San Juan-Alamo I.S.D.
- Police Department**  
Edinburg C.I.S.D.



# 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 761 Pillar Club Members in 2017. Thanks to you and to all who invest in United Way of South Texas.

AEP Texas  
 American Red Cross South Texas Chapter  
 AT&T  
 BBVA Compass Bank  
 Boy Scouts of America, Rio Grande Council  
 Boys and Girls Clubs of Edinburg  
 Boys and Girls Club of McAllen  
 Boys and Girls Club of Pharr  
 Burton McCumber & Longoria, L.L.P.  
 Children's Advocacy Center  
 Citizens State Bank  
 City of Alamo  
 City of Donna  
 City of Edinburg  
 City of Hidalgo  
 City of McAllen  
 City of Mission  
 City of Pharr  
 City of Rio Grande City  
 City of Roma  
 City of San Juan  
 City of Weslaco  
 Corning Optical Communications  
 Delphi  
 Design & Development Institute  
 DHS - CBP Border Patrol (CFC)  
 Dillard's  
 Edcouch - Elsa I.S.D.  
 Edinburg C.I.S.D.  
 Edwards Abstract & Title Co.  
 Elsa State Bank - Edinburg  
 Enterprise Rent-A-Car  
 Federal Express - Ground  
 Federal Express - McAllen  
 Frost Bank - Alamo  
 GE Aviation  
 H-E-B - Donna  
 H-E-B - Edinburg - Clossner  
 H-E-B - Edinburg - Freddy Gonzalez  
 H-E-B - Elsa  
 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 - 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/Warehouse  
 H-E-B - Weslaco - Texas Blvd.  
 H-E-B - Weslaco - Westgate Dr.  
 Hidalgo County  
 Hidalgo County Head Start - Edinburg  
 Hidalgo County Precinct 1  
 Hidalgo County Precinct 2  
 Hidalgo County Precinct 4  
 Hobart  
 Holt Company of Texas - Edinburg  
 Holt Company of Texas - Weslaco  
 Infinity Insurance  
 International Bank of Commerce (IBC)  
 Inter National Bank (INB)  
 International Paper Company  
 JPMorgan Chase  
 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  
 Mayfair Properties, LLC  
 McAllen Chamber of Commerce  
 McAllen I.S.D.  
 Mercedes I.S.D.  
 Mission C.I.S.D.  
 Navy Army CCU  
 NuStar Energy  
 Petroleum Solutions  
 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  
 Salinas, Allen, & Schmidt  
 Security Service Federal Credit Union  
 Serving Children and Adults In Need (SCAN)  
 South Texas Health System  
 South Texas I.S.D.  
 Sprint Communications  
 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 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  
 Vantage Bank  
 Vaughan Interests, Inc.  
 Walmart/Sam's Club - Trenton  
 Walmart - Donna  
 Walmart - Edinburg  
 Walmart - Rio Grande City  
 Wayland Baptist University  
 Wells Fargo  
 Weslaco I.S.D.  
 9 Anonymous Individuals



# OUR PARTNER AGENCIES

American Red Cross  
Aurora House Foundation\*  
Boy Scouts Rio Grande Council  
Boys & Girls Club 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\*  
Community Council of the RGV  
Girls Scouts of Greater So. TX\*  
Green Path, Inc.  
Goodwill Industries of So. TX.\*  
Hidalgo Youth Center  
Mercedes Recreation Center  
Palmer Drug Abuse Program\*  
Serving Children & Adults in Need  
Silver Ribbon Community Partners\*  
Starr Co. Victims of Domestic Violence  
Su Casa De Esperanza  
The Salvation Army  
Women Together

## 2017 Community Impact Grants

### United Way Programs:

Back to School "In Style" Shopping Spree  
Day of Caring  
LatinaHope  
Starr County Family Support Programs  
The Education Council  
Transportation Vouchers  
Volunteer Income Tax Assistance Program

### Other Agencies:

Comfort House  
Habitat for Humanity of the RGV  
So. TX Juvenile Diabetes Association  
Valley AIDS Council

\*Partner Agency (listed above) with a Community Impact Grant

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

# 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:

Advertis, Inc.  
AEP Texas  
BBVA Compass Bank  
Burton McCumber & Longoria, 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  
Wells Fargo



2017 Fund Distribution Volunteers

**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.**

### **Education Council**

Dr. Guerra, Superintendent of South TX I.S.D., led 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 in extenuating circumstances so they may meet basic needs
- Fund food pantries at some school districts

### **Council Members represent:**

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

\*Food Pantries funded by United Way.

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.

**Emergency Food & Shelter Program (EFSP formerly FEMA)** – administered distribution of over \$581,002 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 \$176,150 during the 2016 Campaign.

**Volunteer South Texas** – administered by United Way of South Texas. Over 130 agencies have registered on the free online portal: [volunteersotx.org](http://volunteersotx.org).

- 255 volunteers participated in Volunteer South Texas Week in 2017
- Volunteers contributed more than \$20,000 in economic value to local non profits.

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 partnered with Weslaco I.S.D. in 2017 to empower 100 Juniors and Freshmen with the skills necessary to become successful in college and in a career.**



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

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

Receipts	
Collected Campaign Pledges	\$2,572,719
Admin CFC/SECC	\$123,035
Investment Income	\$6,069
Designated Gifts	\$8,368
Grants	\$68,030
In Kind Donations	\$194,880
	\$2,973,101
Disbursements (Direct Investments to Community)	
Distribution to Partner Agencies	\$1,296,848
Community Impact Grants	\$191,112
SECC/CFC/EFSP Costs	\$184,936
*Program/Community Projects Costs	\$320,691
*Campaign Investments Costs	\$534,591
Emergency Grants	\$40,000
	\$2,568,178
Other Disbursements (Indirect Investment to Community)	
Administrative Costs	\$400,459
Net Contribution to Cash	\$44,853

\*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: 194,880 In-Kind services  
All figures based on 2016 Audit.

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

*We Thank You For Your Support!*

**STAFF**

**Thelma M. Garza**  
President

**Lilly Lopez-Killelea**  
Vice-President  
Resource Development Director

**Maria Flores**  
Outcome Specialist

**Eloise Montemayor**  
Community Relations  
Public Sector Associate

**Eslibeth Perez**  
Special Programs Coordinator

**Marlen Ramirez**  
Data Entry Specialist

**Evangelina Scheffler**  
Administrative Assistant

**United  
Way**



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