

# ANNUAL REPORT

# 2020



Day of Caring "Project FreshStart" Volunteers  
Assemble School Supplies for 3,300 Freshmen

40 Years of  
IMPACT

United  
Way



United Way of South Texas  
Serving Hidalgo & Starr Counties



# A MESSAGE FROM THE PRESIDENT



**Lilly Lopez-Killelea**  
President/CPO

Dear United Way friends,

Like you, I too have spent time reflecting on what is most meaningful to my family, our community and our United Way during the last unprecedented year of our lives. Each of us represents a piece of the community puzzle that is essential to our path to recovery. Today is the time to join causes that you are passionate about, become part of the solution, share your amazing ideas and help our neighbors persevere. This report is a snapshot of some of the important work done by United Way, our partners and passionate volunteers. You will also discover how United Way's unique approach today to outcomes-based investment, community collaboration, and COVID 19 response to

critical needs helps families thrive.

We have so much to be proud of and are grateful for the work done by our non-profit partners, front-line and essential workers, educators, volunteers and so many others who offered services and financial prospects. No matter how big or how small, your financial support and time in the past year have made a difference in the lives of our neighbors. The United Way Board and staff are committed to investing in programs that offer solutions and long-term impact, while focusing on those that offer Education, Health and Financial Stability opportunities. I Live United... join the movement today.

Respectfully,

## 2020 BOARD OF DIRECTORS



**Tyler Stone**  
Mayfair/RIOCO  
Board Chair



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



**Blanca Villalobos**  
IBC Bank  
Finance Co-Chair



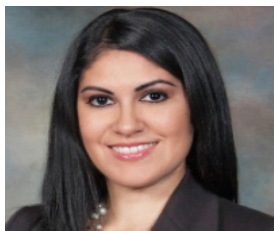
**Larry Gonzalez**  
PlainsCapital Bank  
Finance Co-Chair



**Dr. D'uAndre Drain**  
GE Aviation  
Campaign Co-Chair



**Gerardo Paz**  
South Texas FCU  
Campaign Co-Chair



**Paola E. Castillo**  
Frost Bank  
Fund Distr. Co-Chair



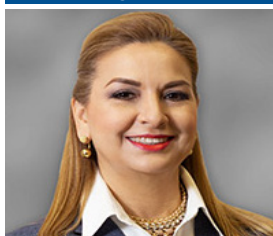
**Lisa Garza**  
RGV Sector USBP  
Fund Distr. Co-Chair



**Lisa Killion**  
Forged Tech. Solutions  
PR Co-Chair



**Lee Jones**  
AEP Texas



**Elvira Alonzo**  
City of McAllen



**Dr. Priscilla Canales**  
Weslaco I.S.D.



**Michelle Quiroz**  
Reserva Coffee Roasters



**Robert Rosell**  
BBVA Bank



# 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 735 Pillar Club Members in 2020. Thanks to you and to all who invest in United Way.**

AEP Texas  
AT&T / CWA  
Aurora House Foundation  
BBVA  
Boys and Girls Clubs of Edinburg  
Boys and Girls Club of McAllen  
Boys and Girls Club of Pharr  
Burton, McCumber & Longoria, L.L.P.  
Burton Companies  
Children's Advocacy Center  
City of Edinburg  
City of Hidalgo  
City of McAllen  
City of Palmview  
City of Rio Grande City  
City of Roma  
City of San Juan  
City of Weslaco  
Costco Wholesale  
Design & Development Institute  
Edinburg C.I.S.D.  
Edwards Abstract & Title Co.  
Exxon Mobile  
FedEx Corporation  
Fox Packaging Co.  
Frost Bank  
GE Aviation  
Greater State Bank  
H-E-B Stores and Distribution Facilities  
Hidalgo County

Hidalgo County Head Start  
Hidalgo County Precincts 1-4  
Hobart  
Holt Company of Texas  
IBC Bank  
International Paper Company  
JPMorgan Chase Bank  
KRGV TV 5  
La Joya I.S.D.  
Lone Star National Bank  
Magic Valley Electric Cooperative  
ManpowerGroup  
Mayfair Properties/Rioco  
McAllen Chamber of Commerce  
McAllen I.S.D.  
Mercedes I.S.D.  
Mission C.I.S.D.  
Monte Alto I.S.D.  
NavyArmy Community Credit Union  
Nuestra Clinica Del Valle  
NuStar Energy L.P.  
Palmer Drug Abuse Program  
Pharr-San Juan-Alamo I.S.D.  
PlainsCapital 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  
Sharyland I.S.D.  
Shepard Walton King Insurance Group  
South Texas Federal Credit Union  
South Texas Health System  
South Texas I.S.D.  
Starr County  
Starr County Memorial Hospital  
State Employee Charitable Campaign  
Su Casa de Esperanza  
Superior Health Plan  
Target Stores  
Texas Gas Service  
Texas National Bank  
Texas Regional Bank  
The Monitor  
The Salvation Army  
Turner Industries  
United Parcel Service (UPS)  
United Way of South Texas  
USAA  
US - DHS CBP OBP  
Valley Land Title  
Vantage Bank Texas  
Walmart Stores/Sam's Club  
Wells Fargo  
Weslaco I.S.D.  
Women Together  
(2) Anonymous

## 2020 PARTNER AGENCIES

American Red Cross, South Texas Chapter  
Aurora House Foundation  
Boy Scouts of America, 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  
Community Council of the RGV (2-1-1)  
Girl Scouts of Greater South Texas

Goodwill Industries of South Texas  
GreenPath Financial Wellness  
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 Program  
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 and community volunteers ultimately determine the selection of the recipients.*



# IMPACT IN 2020

United Way of South Texas funds over 100 programs that address individuals from birth to end of life, resulting in the largest and most benefited from a United Way-funded program in 2020.

## EDUCATION INITIATIVE

### Food Pantries

United Way funds food pantries in four school districts to maintain food security for students and families. School Districts are given the flexibility to purchase various items from their local food bank. Our goal is for students to receive their daily nutritional needs to reach the highest level of educational attainment and job opportunities.



Weslaco Youth Initiative

### Leadership Program

United Way Youth Leadership Program empowers Juniors and Freshmen with leadership skills, soft skills, volunteer opportunities and financial literacy training. School counselors identify Freshmen to participate as mentees and Junior volunteers as mentors. In the past three years, 276 students have benefited from the program.

### 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 who identify crucial needs of students in drop-out recovery programs, administer emergency grants and fund food pantries.

### Back to School "In Style" Shopping Spree

150 Junior High students from 16 school districts return to school "In Style" with the help of the United Way and Target Stores. United Way awards the same opportunity to every participating school district in Hidalgo and Starr Counties on a rotating basis. Each student receives \$125 worth of school clothing and personal hygiene items. Target donates backpacks with school supplies. Over 200 United Way supporters from companies that run United Way Employee Campaigns volunteer as "Shopping Buddies" and help students select school attire.

### Day of Caring

United Way launched Project "FreshStart" in 2011 to provide school supplies for high school Freshmen. Since the start of this project, UWST has invested \$245,248 for 28,900 Freshmen across 16 school districts in Hidalgo and Starr Counties. Every year, over 225 volunteers gather to assemble bags of school supplies.

## FINANCIAL STABILITY

### Community Impact Grants

Community Impact Grants are awarded to agencies to expand or create new programs that focus on Health, Education, or Financial Stability.

- City of Palmview – Youth Center
- Comfort House
- Palmer Drug Abuse Program
- Silver Ribbon Community Partners
- Boys & Girls Club of Pharr/San Juan

### Latina Hope

A collaboration with the McAllen Chamber of Commerce to support women entrepreneurs and their microbusinesses. Participants network on a monthly basis, which allows them to share and learn best practices. They also learn about budgeting and marketing a successful enterprise. A UW COVID grant also provided ecommerce training.

### Volunteer Income Tax Assistance Program

The VITA program is an IRS initiative administered by United Way of South Texas in Hidalgo and Starr Counties. The program is designed to help families, who earned \$60,000 or less in 2020, prepare their income tax returns at no cost. Last year, the VITA program, with the help of over 248 volunteers, assisted 3,967 families. VITA volunteers helped to generate \$7.5 million in federal refunds!



VITA Volunteers Participate in a Phone Bank at Entravision to Offer Tax Information

s Health, Education, Financial Stability and Safety Net. We are the only local organization with the capacity to affect st impactful non-profit footprint in our two-county service area. Over 225,000 residents in Hidalgo and Starr Counties

# HEALTH & SAFETY NET

## Starr Co. Support Programs

United Way funds various programs in Starr County that provide basic necessities for the elderly and disabled; medical assistance to impoverished families, food pantries and much more. Parents receive books for their newborns to introduce them to and encourage reading in the home.



Food Baskets for the Elderly

## Transportation Vouchers

United Way of South Texas distributes transportation vouchers through local nonprofits. 12,038 vouchers were distributed at no cost from 2019-2020. United Way partners with the City of McAllen to provide transportation to clients who are eligible for the vouchers.

## Baby Box Distribution

Baby Boxes are self-contained sleep spaces that have been shown to increase infant safety by reducing the risk of Sudden Infant Death Syndrome (SIDS). UW identified clients and distributed boxes with literature on safe sleeping practices.

## Spirit of Christmas

A collaboration between United Way and The Monitor to help families in need during the holidays. School representatives identify the students and families with the most need. The Monitor features their stories, which may deal with illness, loss of a home or family members, and other extenuating circumstances. In 2020, in spite of the pandemic, monetary donations increased by 36%.

## SingleCare Rx Cards

United Way and SingleCare collaborate to provide free prescription discount cards that require no enrollment or activation. Eligible clients, insured and uninsured, save an average of 42% on their medications. Families saved \$293,570 last year.

## United Way Administers Programs that Leverage Support for Hundreds of Local Non-profits

**Emergency Food & Shelter Program (EFSP)** – Administered the distribution of over \$5,181,679 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 \$145,399 during the 2020 Campaign.

**Volunteer South Texas** – A United Way online volunteer platform. Over 150 agencies have registered on the free online portal: [volunteersotx.org](https://volunteersotx.org). Register to volunteer or sign up your agency on Volunteer South Texas.

# COVID-19 COMMUNITY FUND

The United Way Board and Staff continue to work on investing COVID-19 grants to help families regain their independence.

### PROGRAMS

### AMOUNT ALLOCATED

Direct Services: Food, Utilities, Rental Assistance, Clothing, etc.	\$104,891.00
Community Contribution: Individual Crisis	\$5,000.00
Health Education: COVID-19 Educational Tools, Flyers for Students and Community, PSAs	\$7,500.00
Education & Financial Stability: Training to help Establish Small Businesses Online	\$10,500.00
Mental Health: Addiction and Teen Support Groups	\$27,000.00
Non Profit Employee Appreciation	\$1,223.88
PPE & Equipment: Distributed to over 25 nonprofits and school districts	\$8,014.83
<b>Total Allocated Amount</b>	<b>\$164,129.71</b>



Hot Meals Distributed Daily

AEP Texas, BBVA Foundation, Fidelity Foundation, H-E-B, ONE Gas Foundation, Security Service Federal Credit Union, Truist Foundation, United Way of South Texas, United Way Worldwide, Wells Fargo Foundation and private donors contributed to the Fund.



# CAMPAIGN

**Dr. D'uAndre Drain, Campaign Co-Chair**  
GE Aviation  
**Gerardo Paz, Campaign Co-Chair**  
South Texas FCU

## LOANED EXECUTIVES

**Edna Garcia, Loaned Executive Trainer**  
Security Service FCU  
**Elisa Beas**  
City of Rio Grande City  
**Carmen Gaitan**  
Boys & Girls Clubs of Edinburg  
**Ventura Hinojosa**  
Starr County  
**Cynthia A. Gonzalez**  
City of McAllen  
**Delia B. Perez**  
Starr County  
**Lucy Renteria**  
Starr County  
**Elizabeth Rivera**  
Boys & Girls Club of Pharr  
**Norma Rodriguez**  
City of McAllen  
**Jennifer Sanchez**  
IBC Bank  
**Jaime Sanchez**  
Vantage Bank Texas  
**Vania Vazquez**  
South Texas FCU  
**Isela Garcia**  
BBVA  
**Jessica Marin**  
South Texas FCU



**"TOP 10" COMPANY**  
South Texas Health System



**HIDALGO COUNTY CAMPAIGN COORDINATOR**  
Commissioner "Eddie" Cantu & Olivia Gomez

# TOP 10 COMPANIES

**Our Top 10 Supporting Companies raised over \$886,135 for United Way programs. We appreciate all companies and employees for their contributions.**

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



**COMPANY COORDINATOR OF THE YEAR**  
Maribel Land - NavyArmy CCU

Employees at NavyArmy Community Credit Union branches increased their donations by 104% during the pandemic.



**#1 COMPANY & 2020 SOUTH TEXAS HERO**  
H-E-B Border Region



**LOANED EXECUTIVE OF THE YEAR**  
Elizabeth Rivera - Boys & Girls Club of Pharr/San Juan

# TOP SCHOOL DISTRICTS

## Golden Apple Awards Top 5 District Contributors

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



**#1 GOLDEN APPLE DISTRICT**  
McAllen I.S.D.



**DISTRICT COORD. OF THE YEAR**  
† Susan M. Peterson-Weslaco I.S.D.

## Highest Per Capita Campus & Department

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

**We thank all School Districts in Hidalgo & Starr Counties for their contributions.**

# Statement of Cash Receipts & Disbursement For the Year Ended December 31, 2019

## Receipts

Collected Campaign Pledges	\$1,831,140
Admin Fees EFSP/SECC	\$25,202
Interest Income	\$3,207
Designated Gifts & Other Contributions	\$145,492
Grants	\$48,500
In Kind Donations	\$361,407
	<b>\$2,414,948</b>

## Disbursements (Direct Investments to Community)

Distribution to Partner Agencies	\$1,199,057
Community Impact Grants	\$58,973
EFSP/SECC Costs	\$25,202
Program/Community Projects Costs	\$279,485
Campaign Investments Costs	\$276,704 <sup>1</sup>
Emergency Grants	\$23,100
	<b>\$1,862,521</b>

## Other Disbursements (Indirect Investment to Community)

Administrative Costs	\$474,099 <sup>2</sup>
<small>(Actual Mgmt. Expenses are \$172,686; the balance includes in-kind services. See note below.)</small>	
Net Contribution to Cash	\$78,328

1) Program/Community Project Costs include: Designated Gifts, In-Style Shopping Spree, Day of Caring, Transportation Vouchers, Youth Leadership Program, Latina Hope and Volunteer Income Tax Assistance (VITA).

2) Administrative Costs include \$301,413 in In-Kind Services. United Way recruited and mobilized 1,087 volunteers from local companies, who contributed valuable time (in-kind service) towards United Way program-related events and functions (i.e. Day of Caring, Fund Distribution). Their service hours are both non-monetary contributions to United Way and indirect investments to the community.

NOTE: All figures based on 2019 Audit. 2020 Audit figures are pending.

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



## COMMITTEE CO-CHAIRS

### FINANCE

**Blanca I. Villalobos, IBC Bank, Co-Chair**  
**Larry Gonzalez, PlainsCapital Bank, Co-Chair**

Finance Co-Chairs, with the support of the Board Chair and Board of Directors, review the monthly financial statements and annual audit to ensure transparency and accountability.

### FUND DISTRIBUTION

**Paola E. Castillo, Frost Bank, Co-Chair**  
**Lisa Garza, DHS - RGV Sector USBP, Co-Chair**

FD Co-Chairs work with volunteers to ensure the accountability of Partner Agencies. They review Audits, Program Outcomes, and Facilities. They represented the following companies:

Liza Fox  
BBVA Bank

Art Lopez  
Burton McCumber & Longoria, L.L.P.

Lisa Killion  
Forged Technology Solutions

Michelle Quiroz  
Reserva Coffee Roasters

Edna Garcia  
Security Service FCU

Maria Barrera  
Retired CPA

### COMMUNITY RELATIONS

**Lisa Killion, Forged Tech. Solutions, Co-Chair**  
Oversees the organization's Public Relations and Marketing strategies.

## STAFF

**Lilly Lopez-Killelea**  
President

**Eloise Alvizo**  
V.P./Resource  
Development Director

**Maria Flores**  
Community  
Investment Specialist

**Sabrina Lopez**  
Community Relations/  
Public Sector  
Associate

**Marlen Ramirez**  
Data Entry Specialist

**Evangelina Scheffler**  
Administrative  
Assistant

*40* Years of  
IMPACT



**United Way of South Texas**  
Serving Hidalgo & Starr Counties

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Ph: (956) 686-6331  
[www.unitedwayofsotx.org](http://www.unitedwayofsotx.org)  
[www.volunteersotx.org](http://www.volunteersotx.org)



**CHARITY NAVIGATOR**  
Your Guide To Intelligent Giving



[bbbhouston.org](http://bbbhouston.org)

