

BUILDING STRONGER COMMUNITIES TOGETHER



**2022
ANNUAL
REPORT**

MOBILIZING THE CARING POWER OF OUR COMMUNITY

A MESSAGE FROM THE PRESIDENT



Lilly Lopez-Killelea
President/CPO

In reflecting on our work and impact in 2022, I immediately think of the exceptional people that make United Way of South Texas a leader in health and human services. I am grateful for every member of this inspiring Live United movement—from our Board of Directors, corporate, education, nonprofit and civic partners, to our first-time and longtime investors, individuals, volunteers and staff. Many families, including the elderly, struggled with the effects of inflation, as prices increased rapidly for nearly every basic necessity. The overwhelming change often resulted in mental health crisis. Throughout this period, United Way continued to collaborate with partners to drive impact. Some of the work included investments in our Education Council, to fund emergency grants to support basic needs that became challenging to secure, including: clothing, prescription discount cards, transportation, school supplies and food baskets. Additionally, United Way expanded youth mentorship programs that offered students support groups, literacy projects and after-school youth programs. Thousands of families also benefited from free tax preparation services through the VITA program, allowing them to save and claim much needed benefits.

2022 BOARD OF DIRECTORS



Tyler Stone
Rioco Partners
Past Board Chair



Edna Garcia
Security Service FCU
Strategic Png. Co-Chair



Larry C. Gonzalez
PlainsCapital Bank
Finance Co-Chair



Gerardo Paz
South Texas FCU
Campaign Co-Chair



Elvira Alonzo
City of McAllen
Campaign Co-Chair



Dr. D'Andre Drain
GE Aerospace
Fund Dist. Co-Chair



Cris Moncayo
Vantage Bank Texas
Fund Dist. Co-Chair



Lisa Killion
Forged Tech. Solutions
PR Co-Chair



Michelle Quiroz
Reserva Coffee Roasters



Dr. J.A. Gonzalez
McAllen ISD



Lisa Garza
RGV Sector USBP



Robert Rosell
RGV Partnership



Benita Mendell
The Monitor



Annette S. Garcia
Region One ESC



Robert McGurk
Greater State Bank



Miles Bullion
Half Associates, Inc.

UNITED WAY'S BOARD CHAIR



“Despite the economic challenges faced in the past few years, United Way of South Texas continues to advance our vision and commitment to the community. United Way works relentlessly to identify solutions that allow individuals and families to achieve their human potential through education, financial stability and healthy lives. Our success is attributed to the strong relationships with our supporters, partners and the impact strategies developed by the management team and Board of Directors. We focus on long-term solutions that prepare residents to become self-sufficient.”

Blanca I. Villalobos
IBC Bank
Board Chair

PILLAR CLUB MEMBER COMPANIES

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 families in our community. There were approximately 737 Pillar Club Members in 2022. Thanks to you and to all who invest in United Way.

- | | | |
|---|---|---|
| <p>AEP Texas
Aurora House Foundation
BMO
Boys and Girls Clubs of Edinburg
Boys and Girls Club of McAllen
Boys and Girls Club of Pharr/San Juan
Burton, McCumber & Longoria, L.L.P.
Burton Companies
Children's Advocacy Center
City of Donna
City of Hidalgo
City of McAllen
City of Mercedes
City of Mission
City of Palmview
City of Rio Grande City
City of San Juan
Combined Federal Campaign
DHS - CBP - OBP
DHS - CBP - Hidalgo POE
DHS - CBP - Roma POE
Costco Wholesale
Design & Development Institute
Dillard's
Edinburg C.I.S.D.
Enterprise Rent-A-Car
Exxon
Federal Express
Frost Bank
GE Aerospace
Greater State Bank</p> | <p>H-E-B Stores and Distribution Facilities
Hidalgo County
Hidalgo County Precincts 1-4
Holt Company of Texas
IBC Bank
Illinois Tools Work
International Paper Company
KRGV TV 5
La Joya I.S.D.
La Villa I.S.D.
Lone Star National Bank
Magic Valley Electric Cooperative
Manpower
Mayfair Properties, LLC
McAllen Chamber of Commerce
McAllen I.S.D.
Mercedes I.S.D.
Mission C.I.S.D.
NuStar Energy L.P.
Palmer Drug Abuse Program
Pharr-San Juan-Alamo I.S.D.
PlainsCapital Bank
PNC Bank
Rally Credit Union
Region One ESC
Rio Grande City Grulla 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.</p> | <p>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
Target Stores
Texas Gas Service
Texas National Bank
Texas Regional Bank
The Monitor
Turner Industries
U.S. Bank
United Parcel Service (UPS)
United Way of South Texas
Valley Land Title
Valley View I.S.D.
Vantage Bank Texas
Walmart Stores/Sam's Club
Weslaco I.S.D.
Women Together</p> <p>Private Donors
James W. & Kathleen C. Collins
John & Gloria Fitch
Roy Cisnero
Santos Ramirez
Thelma & Monolo</p> |
|---|---|---|

Top Pillar Club Membership



IMPACT IN 2022

United Way of South Texas funds over 100 programs that impact the Health, Education, Financial Stability and Safety Net of Hidalgo and Starr County families. We are the only local organization with the capacity to impact individuals from birth to end of life, resulting in the most impactful non-profit footprint in our two-county service area. Thanks to supporters, over 175,000 residents in Hidalgo and Starr Counties benefited from a United Way funded program in 2022.

EDUCATION

Youth Leadership Mentorship Program

The United Way's Youth Leadership Mentorship Program empowers Juniors and Freshmen with leadership skills, soft skills, volunteer opportunities and financial literacy training. Counselors identify Freshmen to participate as mentees and Juniors volunteer as mentors. In the past four years, 501 students have participated from the following school districts: Weslaco I.S.D., Mercedes I.S.D., McAllen I.S.D., and Sharyland I.S.D.



Education Council

The Education Council is 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 Grulla I.S.D., Roma I.S.D., and Weslaco I.S.D.). Social workers identify crucial needs of students in drop-out recovery programs, administer UW funded emergency grants and food pantries. An estimated 8,800 food baskets were distributed in 2022 to help families prepare healthy meals.

UW Administers Programs that Leverage Support for Hundreds of Local Non-profits

Emergency Food & Shelter Program (EFSP)

Administered the distribution of over \$2,594,186 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 \$118,400 during the 2022 Campaign.

Volunteer South Texas

A United Way online volunteer platform. Over 230 agencies have registered on the Free portal: volunteersotx.org. Register to volunteer or register your agency on volunteersotx.org.

Back to School "In Style" Shopping Spree

150 middle school students from 16 school districts return to school "In Style". United Way awards the same opportunity to participating districts in Hidalgo and Starr Counties on a rotating basis. Students receive \$125 worth of school clothing and personal hygiene items. Target donates backpacks with school supplies. Over 200 UW supporters from companies that run United Way Employee Campaigns volunteer as "Shopping Buddies".

MORE THAN \$280,000 INVESTED

to purchase essential supplies for students, to allow them to succeed in school.

MORE THAN 2,161 STUDENTS

have participated in the program and started the school year with proper clothing and hygiene items that allow them to focus on learning.

MORE THAN 30,975 UNITS OF SUPPLIES

were distributed to middle school students in 2022 including: jeans, shoes, shirts, personal hygiene items, backpacks, school supplies and other back-to-school products.

Day of Caring - Project "FreshStart"

United Way launched Project "FreshStart" in 2011 to provide school supplies for high school Freshmen in an effort to reduce the drop-out rate. Since the start of United Way's Project "FreshStart" program, UW has invested \$276,308 in students and has helped 32,200 families in Hidalgo and Starr Counties. An estimated 645,900 units of school supplies were distributed in 2022.

FINANCIAL STABILITY



Latina Hope

A collaboration with the McAllen Chamber of Commerce and Wells Fargo, that offered business development classes to support minority women entrepreneurs, with an interest in establishing or expanding microbusinesses in Hidalgo County. Along with attending educational sessions about creating business plans and financial literacy, participants benefitted from the emotional support and relationships that they built throughout the years. E-commerce business grants were also funded during the pandemic and many continue to thrive. Approximately fifty women participated on an annual basis.

HEALTH & SAFETY NET

Transportation Vouchers

United Way of South Texas distributes transportation vouchers at no cost to eligible clients through local non-profits. \$93,584 was invested from 2018-2022. United Way partners with the City of McAllen - Metro McAllen, to provide transportation to clients who are eligible for the vouchers. Some of the program partners include: McAllen I.S.D.; McAllen Housing Authority; Tropical TX Behavioral Health; Endeavors (Veterans); and TX Workforce Solutions.

Single 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. 6,152 families saved \$340,649 in 2022.

Volunteer Income Tax Assistance Program - VITA

The VITA program has been administered by United Way of South Texas for over 12 years. The program is an IRS initiative that is designed to provide free income tax preparation services to families with household incomes of less than \$60,000 in Hidalgo and Starr Counties. Over 130 IRS-trained and advanced certified volunteers, including high school students, college students and retired professionals, participate in the VITA program. United Way tax preparation services are available to eligible clients year-round.

MORE THAN \$5.7 MILLION IN TAX RETURNS

were allotted to VITA clients in the 2022 tax season. VITA ensures that taxpayers receive the maximum tax credits and deductions they may be eligible for.

MORE THAN \$780,000 SAVED

in tax preparation fees. Families on average, spend more than \$300 in tax preparation fees. Savings and refunds are reinvested into our local economy and help families fund major expenses.

MORE THAN 2,600 INDIVIDUALS

and approximately 5,200 family members used VITA, whether it was in person, virtually or on their own by accessing MyFreeTaxes.com. VITA operates at 17 locations across Hidalgo & Starr Counties.

Starr County 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.

Spirit of Christmas

A collaboration between United Way and The Monitor to help families during the holidays. School representatives identify students and families with the most need. Reporters from The Monitor then visit with the families and write stories, which may deal with illness, loss of a home or family members, and other extenuating circumstances. The program has been administered by UW staff and volunteers for nineteen years, and has impacted approximately 1,346 individuals.



South Texas Hero



Tyler Stone
Rioco Partners

Top 10 Companies



COMPANY COORDINATOR OF THE YEAR

LOANED EXECUTIVES OF THE YEAR



Olivia Gomez
Hidalgo County - Precinct 2



Javier Zamora & Linda Gonzalez
City of McAllen - Public Works

The Top 10 Supporting Companies raised over \$752,300 for United Way programs. We appreciate all companies and employees for their contributions.

Top School Districts

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

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

Campaign Co-Chairs

Gerardo Paz, South Texas FCU
Elvira Alonzo, City of McAllen

Loaned Executives

Edna Garcia, Loaned Executive Trainer
Security Service FCU

Mary Aceves Magic Valley Electric Co-op	Maria Ibarra IBC Bank
Diana Alfaro Vantage Bank	Maria E. Lopez Starr Co. Victims of Domestic Violence
Elisa Y. Beas City of Rio Grande City	Jessica Marin South Texas FCU
Marilyn Becerra IBC Bank	Luis Morales Boys & Girls Club of Pharr
Nick Carpenter Vantage Bank	Cynthia Moreno South Texas FCU
JG Desiga Freedom Bank	Daniela Perez South Texas FCU
Matthew Gabriel Greater State Bank	Laura C. Ramirez City of Rio Grande City
Noraa Gamundi IBC Bank	Lucy Renteria Starr Co. Victims of Domestic Violence
Christian Gonzales Boys & Girls Club of Pharr	Mindy Rodriguez AEP Texas
Linda Gonzalez City of McAllen	Javier Zamora City of McAllen
Alondra Guillen City of Rio Grande City	

#1 GOLDEN APPLE DISTRICT OF THE YEAR



Dr. J.A. Gonzalez
McAllen I.S.D.

DISTRICT COORDINATOR OF THE YEAR



Dr. Ruben Borrego
PSJA I.S.D.

Highest Per Capita Campus & Department

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

Statement of Cash Receipts & Disbursement For the Year Ended December 31, 2021

Receipts	\$2,019,276
Collected Campaign Pledges	\$1,489,998
Admin Fees EFSP/SECC	\$21,486
Interest Income	\$9,708
Designated Gifts & Other Contributions	\$65,873
Grants	\$244,489
In-Kind Donations	\$187,722
Disbursements (Direct Investments to Community)	\$1,514,456
Distribution to Partner Agencies	\$847,500
Community Impact Grants	\$172,098
EFSP/SECC Costs	\$21,486
Program/Community Projects Costs	\$218,781 ¹
Campaign Investments Costs	\$249,591
Emergency Grants	\$5,000
Other Disbursements (Indirect Investment to Community)	
Administrative Costs <small>(Actual Mgmt. Expenses are \$163,548; the balance includes in-kind services. See note below.)</small>	\$321,636 ²
Net Contribution to Cash	\$183,184 ³

1. Program/Community Project Costs include: Designated Gifts, In-Style Shopping Spree, Day of Caring Project FreshStart (2), Youth Leadership Program, Latina Hope and Volunteer Income Tax Assistance (VITA).
2. Administrative Costs include \$155,809 in In-Kind Services. United Way recruited and mobilized over 351 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.
3. United Way continued to distribute COVID-19 grants to local non-profits and Youth Leadership Mentorship grants to local districts. The distribution occurred over a three year period.

NOTE: All figures based on 2021 Audit. 2022 Audit figures are pending.

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

2022 PARTNER AGENCIES

American Red Cross, South Texas Chapter	GreenPath Financial Wellness
Aurora House Foundation	Hidalgo Youth Center
Boy Scouts Rio Grande Council	Mercedes Recreation Center
Boys & Girls Clubs of Edinburg	Palmer Drug Abuse Program
Boys & Girls Club of McAllen	Serving Children & Adults in Need
Boys & Girls Club of Mission	Silver Ribbon Community Partners
Boys & Girls Club of Pharr/San Juan	Starr County Victims of Domestic Violence Program
CASA of Hidalgo County	Su Casa De Esperanza
Children's Advocacy Center	The Salvation Army
Comfort House, Inc.	Women Together
Community Council of the RGV (2-1-1)	
Girl Scouts of Greater South Texas	

Community Impact Grants: Alzheimer's Association, City of Palmview Youth Center, Starr County Family Support Programs

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



FINANCE CO-CHAIR

Larry Gonzalez, PlainsCapital Bank

The Finance Co-Chair, with the support of the Board Chair and Board of Directors, reviews and presents monthly financial statements and the annual audit to ensure the organization's transparency and accountability.



FUND DISTRIBUTION

Cris Moncayo, Vantage Bank TX, Co-Chair
Dr. D'uAndre Drain, GE Aerospace, Co-Chair

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

Maria Garcia Retired CPA	Gabrielle G. Espino Frost Bank
Maribel Land Rally Credit Union	Jose Barcenas IBC Bank
Robert Rosell RGV Partnership	Minerva Longoria Chase Bank
Joe Calderon Chase Bank	Michelle Quiroz Reserva Coffee Roasters
Maria Ibarra IBC Bank	David Sandoval IBC Bank
Bacilio Ruiz IBC Bank	



COMMUNITY RELATIONS CO-CHAIR

Lisa Killion, Forged Tech. Solutions

Leads the organization's Public Relations and Marketing strategies.



UNITED WAY OF SOUTH TEXAS STAFF

Lilly Lopez-Killelea
President/CPO

Janet Terrazas
Vice President/Resource
Development Director

Velma Garcia
Community Investment
Specialist

Sabrina K. Lopez
Community Relations/
Public Sector Associate

Marlen Jacobo
Data Entry Specialist

Viridiana Cruz
Financial Stability Coordinator

Evangelina Scheffler
Administrative Assistant

Ericka Hernandez
Administrative Specialist

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CHARITY NAVIGATOR
Your Guide To Intelligent Giving



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