

# 2019 ANNUAL REPORT



# United Way of South Texas 2019 Board of Directors

## EXECUTIVE COMMITTEE

**Edna Garcia**

Board Chair  
Security Service FCU

**Blanca I. Villalobos**

Finance Co-Chair  
IBC Bank

**Lisa Killion**

Campaign Co-Chair  
South Texas Health System

**Fito Mercado**

Fund Distribution Co-Chair  
UTRGV

**Chris Julian**

Community Relations Co-Chair  
Advertir

**Lee Jones**

Past Board Chair  
AEP Texas

**Tyler Stone**

Finance Co-Chair  
Mayfair/RIOCO

**D'uAndre Drain**

Campaign Co-Chair  
GE Aviation

**Paola E. Castillo**

Fund Distribution Co-Chair  
Frost Bank

**Jeanette Ahlenius**

Community Relations Co-Chair  
Wayland Baptist University

## BOARD MEMBERS

**Elvira I. Alonzo**

City of McAllen

**Lisa Garza**

DHS-RGV Sector USBP

**Larry C. Gonzalez**

PlainsCapital Bank

**Dr. Priscilla Canales**

Weslaco I.S.D.

**Robert Rosell**

BBVA Bank



Pictured left to right: Larry C. Gonzalez, PlainsCapital Bank; Lee Jones, AEP Texas; Dr. Priscilla Canales, Weslaco I.S.D.; Tyler Stone, Mayfair/RIOCO; Blanca I. Villalobos, IBC Bank; Edna Garcia, Security Service FCU; Michelle Quiroz, Reserva Coffee Roasters; Lisa Killion, South Texas Health System; Paola E. Castillo, Frost Bank; Gerardo Paz, South Texas FCU; and D'uAndre Drain, GE Aviation.

**United Way Board of Directors at the 2020 Awards Ceremony**



# A Message From The President

Dear United Way friends,

Thank you! You have made the first year in my new role as President & CPO, one filled with tremendous adventure and the spirit to pursue unlimited opportunities. On behalf of our staff, volunteers and Board of Directors, I extend our wholehearted gratitude.

Throughout our history, we have proven to be an enduring force in empowering families in Hidalgo and Starr Counties. As our community grows and evolves, so has our United Way. Our Mission—to improve lives by mobilizing the caring power of our community to advance the common good—guides our daily path and strengthens our resolve to identify positive and transformative solutions. We wrapped up the year with many accomplishments that included: enrolling 100 students from Weslaco ISD in United Way's third year of its Youth Initiative Leadership Mentorship program (over 275 students have benefited from the program since 2017); reintroducing the Spirit of Christmas holiday story series with The Monitor to assist dozens of families who struggled to secure basic necessities; funding food pantries at four school districts to assist children who otherwise may only have one or two meals over the weekend; managing the US EFSP Supplemental Humanitarian grant to assist non-profits and municipalities that provided services to refugees; training VITA volunteers to prepare income tax returns at no cost for over 4,400 families that had returns of \$6.8 million to reinvest into our economy; funding over 22 non-profit local agencies that offer programs to assist over 225,000 local residents.

We do this by working alongside organizations, businesses, other nonprofits, government, civic and community leaders, as well as volunteers—to improve the Health, Education, and Financial Stability of all our neighbors and to positively impact our local economy. United Way mobilizes people from all walks of life to impact change, not only through the power of giving, but through sometimes a larger investment—our personal time. You help us transform lives and deliver results—from providing back-to-school clothing for children, offering counseling to victims of family violence, and providing after school programs for youth, to ensuring that families receive the most significant income tax return.

As we look forward to 2020 and beyond, we are excited to continue our work with you by our side, building on the successes of the past and seizing the opportunities that lie ahead. Thank you for being proud ambassadors of United Way...we never forget that you are our strength and guiding light.

Respectfully,  
Lilly Lopez-Killelea  
President/CPO

# IMPACT IN 2019

United Way of South Texas funds over 100 programs that address and affect individuals from birth to end of life, resulting in the largest impact. Hidalgo and Starr Counties benefited from a United Way-funded

## EDUCATION INITIATIVE

### 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 that identify crucial needs of students, offer emergency grants and fund food pantries.

### FOOD PANTRIES

United Way of South Texas funds local food pantries in four school districts to maintain food security for students and families. School Districts are given the flexibility to purchase various items (canned food, dry goods, and non-perishable items, etc.) from their local food bank to operate food pantry sites on school grounds. Our goal is for students to receive their daily nutritional needs to reach the highest level of educational attainment and job opportunities.

### Leadership Program

The United Way Youth Leadership Program empowers Juniors and Freshmen with leadership skills, soft skills, volunteer opportunities and financial literacy. School counselors identify Freshman to participate as mentees and Juniors volunteer as mentors. In the past two years, 176 students have benefited from the program.



Weslaco I.S.D. Youth Initiative Graduates



Hidalgo County Day of Caring Event



Starr County Day of Caring Event

### 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 16 school districts in Hidalgo and Starr Counties. Every year, over 120 volunteers from various companies, schools, agencies, and govt. entities gather to assemble bags of school supplies.

### 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 of South Texas 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 \$150 worth of school clothing and personal hygiene items. Target donates backpacks with some school supplies. United Way supporters from companies that run United Way Employee Campaigns volunteer as "Shopping Buddies" and help the students select school attire. It's a great way for over 200 volunteers to be involved in a program that they support through their contributions to United Way.

Health, Education, Financial Stability and Safety Net. We are the only local organization with the capacity to and most impactful non-profit footprint in our two-county service area. Over 225,000 residents in program in 2019.

# HEALTH & SAFETY NET

## Transportation Voucher Program

Transportation vouchers are distributed to eligible agencies whose clients have no means of transportation to get to medical appointments, employment and support services.

## Baby Box Program

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). Parents take a 15-minute course on safe sleeping practices and can pick up their baby box at no cost after scoring 100%.



Weslaco I.S.D. Students at a Service Project



Baby Box with Bag of Essentials

## Spirit of Christmas

A collaboration between United Way of South Texas 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. The Community is given an opportunity to donate directly to families. In 2019, community members donated various items, ranging from Christmas gifts and essential items (i.e. groceries, diapers, blankets, clothes) to furniture items, home repair assistance and even employment.

# FINANCIAL STABILITY

## Volunteer Income Tax Assistance (VITA) Program

The VITA program is an IRS initiative overseen by United Way of South Texas in Hidalgo and Starr County. The program is designed to help families, who earned \$60,000 or less in 2019, prepare their income tax returns at no cost. Last year, the VITA program, with the help of over 400 volunteers, assisted 4,493 families. VITA volunteers helped to generate \$6.9 million in federal refunds!



VITA Volunteers



VITA Volunteer and Clients

## Americorps VISTA Member

The Corporation for National and Community Service and United Way Worldwide granted our United Way an AmeriCorps VISTA Member, Julianna Berlanga, to serve during the 2019-2020 year. She is a Mission, TX native who has been instrumental to our VITA Program. She has secured sponsorships, recruited and managed VITA volunteers, and enhanced our efforts to make VITA services more accessible to low-to-moderate income households.

# CAMPAIGN

**Lisa Killion, Campaign Co-Chair**  
South Texas Health System  
**D'uAndre Drain, Campaign Co-Chair**  
GE Aviation

## LOANED EXECUTIVES

**Mary Aceves**, Magic Valley Electric Cooperative  
**Daniel Alvarez**, IBC Bank  
**Joanna Alvarez**, IBC Bank  
**Elisa Beas**, City of Rio Grande City  
**Marilyn Becerra**, IBC Bank  
**Robert Chamberlain**, Security Service FCU  
**Carmen Gaitan**, Boys & Girls Clubs of Edinburg  
**Kay Garza**, Wells Fargo  
**Mariana Garza**, IBC Bank  
**Erika George**, Wells Fargo  
**Ventura Hinojosa**, Starr County  
**Mayra Jasso**, Wells Fargo  
**Maribel Land**, NavyArmy CCU  
**Denise Ortega**, City of McAllen  
**Jared Ortega**, Texas National Bank  
**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  
**Juliana Treviño**, Vantage Bank Texas  
**Monica Treviño**, Vantage Bank Texas  
**Jennifer L. Vasquez**, Starr County  
**Vania Vazquez**, South Texas FCU

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.

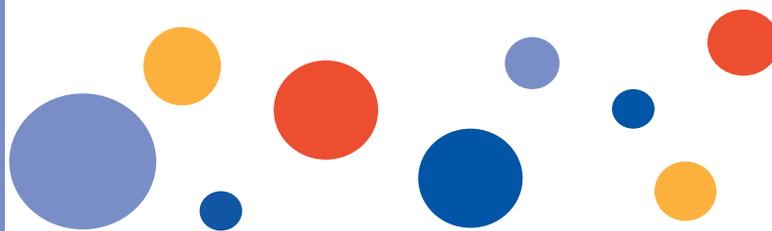


(Pictured above) 2019 Loaned Executives at training with 2019 Board Chair Edna Garcia, Security Service Federal Credit Union, Campaign Co-Chair D'uAndre Drain, GE Aviation, and Campaign Co-Chair Lisa Killion, South Texas Health System.

# TOP 10 COMPANIES

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

Our Top 10 Supporting Companies (pictured to the right) raised over \$990,593 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) Edinburg C.I.S.D.
- 3) La Joya I.S.D.
- 4) PSJA I.S.D.
- 5) Weslaco I.S.D.

## Highest Per Capita Districts

- |  |  |
|--|--|
| <b>Region One ESC</b><br>(under 999 Employees) | <b>Mission C.I.S.D.</b><br>(2000-2999 Employees) |
| <b>Roma I.S.D.</b><br>(1000-1999 Employees)    | <b>McAllen I.S.D.</b><br>(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--21% of the total campaign.**



## TOP 10 COMPANIES



## GOLDEN APPLE SCHOOL DISTRICTS



## 2020 SOUTH TEXAS HERO-EDNA GARCIA

On March 5, 2020, The United Way of South Texas Board of Directors recognized Edna Garcia 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. Edna Garcia is a key player in the success of her company, her employees and the United Way. She has over 30 years of credit union experience. Edna has been employed with Security Service Federal Credit Union for over 8 years, and serves as the Assistant Vice President of South Texas for their Member Service Operations in the Rio Grande Valley and Coastal Bend. Mrs. Garcia has served in various roles at United Way, including Board Chair, Campaign Co-Chair, and Loaned Executive Trainer. Her dedication to the United Way and many worthy community non-profits is commendable.



## COMPANY COORDINATOR OF THE YEAR Denise Ortega & Norma Rodriguez City of McAllen



## DISTRICT COORDINATOR OF THE YEAR Alonzo Barbosa, EDINBURG C.I.S.D.

# United Way Programs

- Back to School “In Style” Shopping Spree
- Baby Box Program
- Day of Caring
- FamilyWize (Prescription Discount Cards)
- Latina Hope
- Spirit of Christmas
- Starr County Family Support Programs
- The Education Council
- Transportation Vouchers
- United Way Youth Leadership Program
- Volunteer Income Tax Assistance (VITA)

**Emergency Food & Shelter Program (EFSP)** – 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 \$184,791.08 during the 2019 Campaign.

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

**Community Impact Grant** – A special grant awarded to Comfort House for their end-of-life care services in McAllen Texas.



Education Council with United Way Board of Directors



Students at Boys and Girls Club of Pharr

## OUR 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)
- Girls Scouts of Greater South Texas

- GreenPath Financial Wellness
- 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 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 ultimately determines the selection of the recipients.*



## 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 830 Pillar Club Members in 2019. Thanks to you and to all who invest in United Way.

AEP Texas  
 American Red Cross, South Texas Chapter  
 AT&T / CWA  
 Aurora House Foundation  
 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 Mission  
 City of Palmview  
 City of Rio Grande City  
 City of Roma  
 City of San Juan  
 City of Weslaco  
 Costco Wholesale  
 Design & Development Institute  
 Dillard's  
 Donna I.S.D.  
 Edinburg C.I.S.D.  
 Edwards Abstract & Title Co.  
 Enterprise Rent-A-Car  
 FedEx Corporation  
 Fox Packaging Co.  
 Frost Bank  
 GE Aviation  
 Givilancz & Martinez, P.L.L.C.  
 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  
 Knapp Medical Center  
 KRGV TV 5  
 La Joya I.S.D.  
 Lone Star National Bank  
 Magic Valley Electric Cooperative  
 ManpowerGroup  
 Mayfair Properties, L.L.C.  
 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 FCU  
 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 National Bank  
 Texas Regional Bank  
 The Monitor  
 The Salvation Army  
 Turner Industries  
 United Parcel Service (UPS)  
 United Way of South Texas  
 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

# FUND DISTRIBUTION VOLUNTEERS

**Fito Mercado**, University of Texas - RGV, Co-Chair  
**Paola E. Castillo**, Frost Bank, Co-Chair

Approximately 35 volunteers were part of the Audit, Program, Facilities and Outcome review process.

They represented the following companies:

BBVA Bank  
Burton McCumber & Longoria, L.L.P.  
City of McAllen  
City of Weslaco  
Frost Bank  
H-E-B  
Hidalgo County Court #6  
IBC Bank  
JPMorgan Chase Bank  
Mission C.I.S.D.  
South Texas College

South Texas Federal Credit Union  
The Monitor  
US Border Patrol  
UT-RGV  
Vantage Bank Texas  
VA Texas Valley Coastal Bend Health Care System  
Walsh Gallegos Treviño Russo & Kyle P.C.  
Walmart  
Wayland Baptist University  
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!



**Fund Distribution Volunteers at Hidalgo Youth Center**

# Statement of Cash Receipts & Disbursement For the Year Ended December 31, 2018

## Receipts

Collected Campaign Pledges	\$1,893,502
Admin Fees EFSP/SECC/CFC	\$75,760
Investment Income	\$1,494
Designated Gifts & Other Contributions	\$31,995
Grants	\$93,920
In Kind Donations	\$355,224
	<b>\$2,451,895</b>

## Disbursements (Direct Investments to Community)

Distribution to Partner Agencies	\$1,258,040
Community Impact Grants	\$188,653
EFSP/SECC/ CFC Costs	\$75,760
Program/Community Projects Costs	\$141,055 <sup>1</sup>
Campaign Investments Costs	\$269,948
Emergency Grants	\$20,000
	<b>\$1,953,456</b>

## Other Disbursements (Indirect Investment to Community)

Administrative Costs <i>(Actual Mgmt. Expenses are \$178,370; the balance includes in-kind services. See note below.)</i>	\$474,589 <sup>2</sup>
Net Contribution to Cash	\$23,850

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

2) Administrative Costs include \$296,219 in In-Kind Services. United Way recruited and mobilized 1,200 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 2018 Audit. 2019 Audit figures are pending.

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

## STAFF

**Lilly Lopez-Killelea**  
President

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

**Maria Flores**  
Community Investment  
Specialist

**Taylor Dion**  
Community Relations/  
Public Sector Associate

**Marlen Ramirez**  
Data Entry Specialist

**Evangelina Scheffler**  
Administrative Assistant

**Julianna Berlanga**  
Americorps VISTA Member



United Way of South Texas  
Serving Hidalgo and Starr Counties

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