United Way of South Texas
2019 Board of Directors

EXECUTIVE COMMITTEE

Edna Garcia
Board Chair
Security Service FCU

Lee Jones
Past Board Chair
AEP Texas

Blanca I. Villalobos
Finance Co-Chair
IBC Bank

Tyler Stone
Finance Co-Chair
Mayfair/RIOCO

Lisa Killion
Campaign Co-Chair
South Texas Health System

D’uAndre Drain
Campaign Co-Chair
GE Aviation

Fito Mercado
Fund Distribution Co-Chair
UTRGV

Paola E. Castillo
Fund Distribution Co-Chair
Frost Bank

Chris Julian
Community Relations Co-Chair
Advertir

Jeanette Ahlenius
Community Relations Co-Chair
Wayland Baptist University

BOARD MEMBERS

Elvira I. Alonzo
City of McAllen

Dr. Priscilla Canales
Weslaco I.S.D.

Lisa Garza
DHS-RGV Sector USBP

Robert Rosell
BBVA Bank

Larry C. Gonzalez
PlainsCapital 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, Se-
curity Service FCU; Michelle
Quiroz, Reserva Coffee
Roasters; Lisa Killion, South
Texas Health System; Paola
E. Castillo, Frost Bank; Gerar-
do Paz, South Texas FCU; and
D’uAndre Drain, GE Aviation.
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

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.

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 gov’t 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.
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 225,000 residents in Hidalgo and Starr Counties benefited from a United Way-funded program in 2019.

**FINANCIAL STABILITY**

**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%.

**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!

**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.

**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.
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.

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.

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
Region One ESC (under 999 Employees)
Roma I.S.D. (1000-1999 Employees)
McAllen I.S.D. (over 3000 Employees)

We thank all School Districts in Hidalgo & Starr Counties for their contributions--21% of the total campaign.
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.
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. 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.

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)

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.
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.
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!
## Statement of Cash Receipts & Disbursement

**For the Year Ended December 31, 2018**

### Receipts

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collected Campaign Pledges</td>
<td>$1,893,502</td>
</tr>
<tr>
<td>Admin Fees EFSP/SECC/CFC</td>
<td>$75,760</td>
</tr>
<tr>
<td>Investment Income</td>
<td>$1,494</td>
</tr>
<tr>
<td>Designated Gifts &amp; Other Contributions</td>
<td>$31,995</td>
</tr>
<tr>
<td>Grants</td>
<td>$93,920</td>
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<tr>
<td>In Kind Donations</td>
<td>$355,224</td>
</tr>
<tr>
<td><strong>Total Receipts</strong></td>
<td><strong>$2,451,895</strong></td>
</tr>
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### Disbursements (Direct Investments to Community)

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution to Partner Agencies</td>
<td>$1,258,040</td>
</tr>
<tr>
<td>Community Impact Grants</td>
<td>$188,653</td>
</tr>
<tr>
<td>EFSP/SECC/ CFC Costs</td>
<td>$75,760</td>
</tr>
<tr>
<td>Program/Community Projects Costs</td>
<td>$141,055</td>
</tr>
<tr>
<td>Campaign Investments Costs</td>
<td>$269,948</td>
</tr>
<tr>
<td>Emergency Grants</td>
<td>$20,000</td>
</tr>
<tr>
<td><strong>Total Disbursements</strong></td>
<td><strong>$1,953,456</strong></td>
</tr>
</tbody>
</table>

**Other Disbursements (Indirect Investment to Community)**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Costs</td>
<td>$474,589</td>
</tr>
</tbody>
</table>

(Actual Mgmt. Expenses are $178,370; the balance includes in-kind services. See note below.)

**Net Contribution to Cash**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Contribution to Cash</strong></td>
<td><strong>$23,850</strong></td>
</tr>
</tbody>
</table>

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.

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**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