

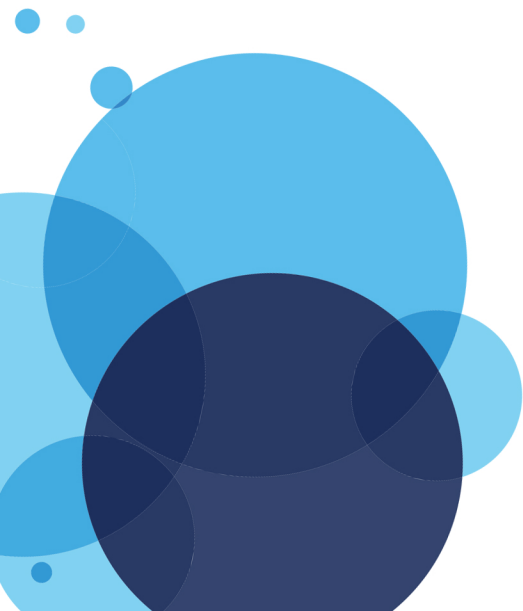


ANNUAL REPORT 2022

F.O.C.U.S.
FOUNDATION
For Our Children's Ultimate Success

‘Volunteers do not necessarily
have the TIME;
they just have the HEART.’

Elizabeth Andrew



The FOCUS Foundation is a 501(c)3 non-profit organization which has established goals in the following areas:

- Granting funds to educators who spend money out of their pockets
- Encouraging students to read
- Presenting financial literacy topics to various groups in the community

The Foundation was formed in 2007 and since that time there has been over \$267,734 granted to educators in our community. Children and education are the passion of the Foundation.

The word FOCUS spelled out equals "For Our Children's Ultimate Success".

Where do the funds come from?

All the FOCUS Foundation funds come from fundraisers with our staff and Board of Directors volunteering their time, efforts and suggestions.

Starting in 2022, the committees determined a different direction was necessary. There will be two main events – Howdy Daze Event and a Trunk or Treat Event. Both events are "free" for the community participants. There are vendor sponsors for both events.

There are other fundraisers throughout the year to continue to raise funds for our special cause. Some of these include: Candy Sales, Dress Down, Casual Dress Days and our annual Raffle.

Where do the funds go?

The funds are disbursed in grant forms to educators who show a need for an expense for their school or their students, playground equipment, library books and more. During 2022, we granted over \$8,385 back to the schools in our six-county area.

The FOCUS Foundation continues to fill a void for these educators who applied for grants. The grant requires it to be for an academic purpose. This, in turn, assists our educators in the classrooms which will enhance the learning of the children in our communities.

During 2022, CoastLife Credit Union introduced the Helping Hands Program to their staff. This gives these employees the opportunity to donate to the FOCUS Foundation. During 2022, there was \$4,458 donated by CoastLife Credit Union staff.

What other programs are under the FOCUS Foundation umbrella?

Leadership Academy

This is the first year of collaboration with the Cornerstone League. The league offers a "free" curriculum program that educates the Young Professionals in the Credit Union industry. It is a 9-month program where employees of various credit unions learn about the credit union industry, becoming a strong leader, advocacy, accounting, branch development, strategic planning and so much more. During 2022 there were 4 credit unions participating – CoastLife Credit Union, Members First Credit Union, Postal Employees Credit Union and Rally Credit Union. The Coastal Bend Chapter of Credit Unions supports the Leadership Academy, and the annual graduation is held in lieu of a chapter meeting in December. This was the first graduating class for Leadership Academy.

Sports and Wellness Program

In 2014, the FOCUS Foundation was approached to partner with the Summer Sports and Wellness Program. A partnership directed by Raul Munoz, a Preferred Partner of CoastLife Credit Union and TAMUCC Department of Kinesiology.

The program, typically, provides fitness activities, nutritional education, strategies for developing healthier lifestyles including financial literacy and diabetes education for prevention and mitigation. In addition, participants



were exposed to a fun, caring and nurturing university environment. This program provides this great opportunity to approximately 125 low-income students in the Nueces County area.

Initially this was a federally funded program, but that funding was discontinued a few years ago. Hence, our program has become dependent on outside sources. The TAMU-CC Department of Kinesiology continues to host the program in their facilities. However, due to university policy as it relates to programs funded through outside entities, support was channeled through another non-profit organization. Hence, the partnership with the FOCUS Foundation.

2022 Highlights

- We added 25 participants to our program bringing our enrollment to 125 students this year.
- Average Daily Attendance - 115 participants
- Our "Family Focus" event was a success, we had approximately 225 people in attendance.
- Miguel Lopez, a former participant in the program contacted us on behalf of Driscoll Health Plan (DHP). He stated he really enjoyed the summers he spent at camp and wanted to give back. With his help, DHP donated \$10,000 and he along with his resources, provided health education classes to our participants. This partnership with DHP was a success and we hope to continue for years to come.
- Last-minute funds were provided to take our participants to the Houston Space Center.
- The TAMUCC Reading Department provided one-on-one instruction for 23 of our participants.
- We added a full-time education coordinator who helped provide most participants with 16 hours of both math and reading enrichment.
- In total, participants remained active and had an estimated 65 hours of physical activity throughout the program.

A special thank you to the sponsors of the Summer Sports and Wellness Program: Behmann Brothers Foundation, Coastal Bend Community Foundation, Driscoll Health Plan, HEB, Nueces Electric Charities, Nueces County Commissioners Court, Puente De Maravillas Foundation, Ruben and Sara Sanchez, and Shell Oil Foundation.

Live 2 Lead

The Live2Lead program is initiated by the John C. Maxwell Corporation. This is a 4-hour leadership development simulcast that is held in October annually. Typically, there are 4 leaders, and they present their tips for success. This program is a collaboration among credit unions and those that want to continue their development.

Young Professionals (YP)

The Young Professionals are a group of up-and-coming leaders 40 and younger that are employed with Credit Unions in the coastal bend area. CoastLife Credit Union has the most members within this group. Their annual fundraiser is a cornhole tournament whereas there is friendly competition, food and a raffle. These funds are then used to prepare "Blessing Bags" for the visitors of the St. Theresa Shelter. These "Blessing Bags" contain the essentials for those staying at this shelter. These bags are delivered on Thanksgiving Day. Kelcy Rapier-Landin is the YP Advocate and she represents CoastLife Credit Union at the Cornerstone League meetings.

This group also spends time with the Purple Door providing a variety of items from a Kids Movie Night to Christmas gifts etc.

What else do the volunteers of the FOCUS Foundation do?

The FOCUS Foundation provides financial literacy presentations throughout schools and organizations annually. The staff of CoastLife Credit Union regularly volunteer. These topics include, but are not limited to, balancing your checkbook, all about savings, credit cards, lending, real estate loans, credit bureau reports, budgeting and our most popular, identity theft/fraud. Financial literacy education is presented at employer group meetings, parent meetings, in student classrooms, faculty meetings and more. Education is an important component of the FOCUS Foundation



INCOME AND EXPENSE STATEMENT

Year Ending December 31, 2022

REVENUE/RECEIPTS

Fundraiser:	
Trunk or Treat Event	\$ 7,931.79
Candy	1,303.22
Money Bag	10.00
Donation Boxes	68.91
Raffle Sales	1,247.07
Sports & Wellness Program	0.00
Grants	49,125.00
Donations	4,041.60
Behman Brothers	3,000.00
NEC	3,000.00
Nueces County	3,000.00
Camper Fees	4,260.00
HEB Grant	10,000.00
YP	
Donation	20.00
Cornhole Teams	1,080.00
Cornhole Sponsor	4,850.00
Cornhole Raffle, Cash from Event	719.00
Leadership Academy	14,000.00
Researching	0.00
Rewards Deposit	2,050.00
Helping Hands Payroll Deductions	4,456.00
Howdy Daze	2,211.96
Charity of Choice	42.81
Miscellaneous	731.06
Interest	1,172.18
Total Receipts	\$118,320.60

EXPENSES/DISBURSEMENTS

Grants	\$ 8,385.78
Children's Advocacy Center	2,500.00
Acct Fees	9.00
Taxes (990 Form)	117.21
American Advertising Federation	10.00
Leadership Academy	6,863.00
Sports and Wellness	0.00
Reimburse Raul Munoz	3,202.39
Facility Charge-Camp	30,000.00
NASA Trip	9,244.54
Camp Fees	3,995.21
Counselor Scholarships	4,000.00
Teacher of the Week - Carroll HS	250.00
YP	0.00
Dinner	205.82
Cornhole Expenses	1,314.99
Shirts for Conference	159.61
Fruit Bowl for GO-5th Street	35.00
Purple Door Movie Night/Day of Giving	595.26
Food for YP Volunteers	63.85
Blessing Bag Expense	1,833.86
CCEF Sponsorship	5,000.00
Sam's Club Membership	110.00
Maxwell Live2Lead	2,250.00

INCOME AND EXPENSE STATEMENT

Year Ending December 31, 2022 (Cont.)

Fundraiser Expense:	0.00
Trunk or Treat	1,064.82
Candy	1,550.19
Tax Filing Form 990	100.00
Insurance	250.00
Total Expenses	<u>\$ 83,775.53</u>
Income (Loss) YTD 12/31/22	<u>\$ 35,210.07</u>

Assets 01/01/2022	\$277,401.26
Assets 12/31/2022	<u>\$312,611.33</u>
Net Change	<u>\$ 35,210.07</u>

STATEMENT OF FINANCIAL POSITION

December 31, 2022

ASSETS

Current Assets:	
Savings - Leadership Academy	\$ 5,692.03
Savings - Live2Lead	6,221.70
Sports and Wellness Program	86,395.31
YP Group	4,265.13
Checking	29,111.94
PIA	<u>180,925.22</u>
Total Assets	<u>\$312,611.33</u>

LIABILITIES AND NET ASSETS

Liabilities:	
TAMUCC Sport Camp Payable	\$ 0.00
Senior Students Grants Payable (Outstanding)	0.00
Equity	<u>312,611.33</u>
Total Liabilities and Net Assets	<u>\$312,611.33</u>

COMMITTEE MEMBERS

Board of Directors

Gina Prince, President
Missy Garcia, Vice President
Eric Jaramillo, Secretary
Evelin Hernandez, Treasurer
Sondra Harrell, Community Member
Edward Rivas, Community Member
Lavonne Spears, Community Member

Young Professionals Committee

Edward Rivas, Chair
Sierra Samuelson, Co-Chair
Kelcy Rapier-Landin, Secretary
Evelin Hernandez, Treasurer
Araceli Brown
Desiree Casares
JC Cavazos
Marc Chavez
Valerie Elizalde
Cayla M. Floyd
Alexis R. Garcia
Elsa Hughes
Abbaggle M. Lopez
Gina Moreno
Kimberly A. Ruiz
Karyn F. Silva
Joe Wilmot
Mary M. Zepeda

Sports and Wellness Program

Raul Munoz, Director

Executive Committee

Missy Garcia
Evelin Hernandez
Eric Jaramillo
Gina Prince

Howdy Daze Committee

Sondra Harrell, Chair
JC Cavazos
Ashley Flores
Alexis Garcia
Irene Garza
Lisa DeLa Garza
Valerie Elizalde
Eric Jaramillo
Gina Moreno
Laura Orosco
Michelle Perez
Rosemary Ringham

Trunk or Treat Committee

Sondra Harrell, Chair
Tiffany Benavides
JC Cavazos
Lisa DeLa Garza
Irene Garza
Eric Jaramillo
Gina Moreno
Victoria Ortiz
Joe Wilmot



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