

TAFP FOUNDATION BOARD OF TRUSTEES

Friday, April 12, 2024

12:45 – 2:15 p.m. CT

Zoom Meeting ID: **825 0569 8689** | Passcode: **010559**

Brazos, Renaissance Austin Hotel

AGENDA

1. Call to order by Linda Siy, MD, President.
2. Roll call and introduction of guests/members.
3. Approval of Minutes of meeting on November 11, 2023
4. Current Business
 - A. Family Medicine Resident Scholars program
 - i. Announcement of new scholars
 - ii. Meet with scholars – Madeline Huff, MD
 - B. Financial Report
 - i. Financial reports – Puja Sehgal, MD
 - ii. Investment report – Stephen Benold, MD
 - iii. Potential large gift from TAFP reserves
 - C. Update on travel funding for students and residents
 - D. Engraved glass incentive for donors at ASPCS – Donald Niño, MD
 - E. Research – Richard Young, MD
 - F. Elect Nominating Committee
5. Information Items
 - A. Cumulative Donors and Monthly Donors
 - B. Scholarship Update
 - C. Activities at 2024 Annual Session & Primary Care Summit
6. Other Business
7. Adjourn

FOUNDATION BOARD OF TRUSTEES

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1 **TAFP FOUNDATION BOARD OF TRUSTEES**

2 Date: November 11, 2023

3

4 **Members participating:**

5 Justin V Bartos, MD, FAAFP

6 Adrian Billings, MD, PhD, FAAFP

7 Kyle Breed, Student Advisor

8 Douglas Curran, MD, FAAFP

9 Tricia C Elliott, MD, FAAFP

10 Lewis Foxhall, MD, FAAFP

11 Roland Goertz, MD

12 Lesca C Hadley, MD, FAAFP

13 Rebecca Hart, MD, FAAFP

14 Terrance S Hines, MD, FAAFP

15 Shelley Kohlleppel, MD

16 Ashok Kumar, MD, FAAFP

17 Eric Lee, MD, FAAFP

18 Javier D. Margo, MD, FAAFP

19 Adam Mendonca, MD, Resident Advisor

20 Dale C Moquist, MD, FAAFP

21 Donald Nino, MD, FAAFP

22 David Schneider, MD, FAAFP

23 Puja Sehgal, MD

24 Linda Marie Siy, MD, FAAFP

25 Erica W. Swegler, MD, FAAFP

26 Paul Swegler

27 Lloyd Van Winkle, MD, FAAFP

28 Richard Young, MD

29

30 Lane Aiena, MD, Ex Officio

31 Vicky Bakhos Webb, MD, MBA, FAAFP, Ex Officio

32 Lindsay Botsford, MD, MBA, FAAFP, Ex Officio

33 Emily D Briggs, MD, MPH, FAAFP, Ex Officio

34 Mary Suzanne Nguyen, MD, FAAFP, Ex Officio

35 Ikemefuna Okwuwa, MD, FAAFP, Ex Officio

36

37 **Others participating:**

38 Kathy McCarthy- Staff

39 Juleah Williams– Staff

40 Stephen Benold, MD – Investment Advisor

41 Jordan Benold – Investment Advisor

42 Tove Goldson, MD

43 Dorcas Omari, MD, Resident Scholar

44

45 **CALL TO ORDER**

46

47 The meeting was held at the Gaylord Texan Hotel and over Zoom. It was called to order at 9:15 a.m.

48

49

1 **ROUTINE BUSINESS**

2
3 The minutes of the April 21, 2023, meeting were approved without modification.

4
5 **AD HOC COMMITTEE ON TRAVEL FUNDING**

6
7 An ad hoc committee was formed to develop a proposal for changes to TAFP Foundation travel
8 funding to both find the best way to use the limited funds and find a way to support as many
9 students and residents as possible to attend the new TAFP Student and Resident Summit in 2024.
10 Drs. Linda Siy, Dale Moquist, Justin Bartos, Vicky Bakhos Webb, Jennifer Archer and Christina Harkey
11 met with Kathy McCarthy and Juleah Williams to discuss and develop recommendations. Kathy went
12 through their recommendations with the Board of Trustees and answered questions.

13
14 **General recommendations for in-state meetings:**

- 15 • Institute a new funding system for in-state meetings based on the approximate distance to
- 16 the conference from the city of the medical school or residency program.
- 17 • Provide support for members of the TAFP Resident and Student Leader Forum for all three
- 18 conferences using the zone limits.
- 19 • Provide up to \$250 extra reimbursement for council members and Member Assembly
- 20 Delegates and Alternates for annual session since those meetings may require an additional
- 21 night at the hotel.
- 22 • Provide support for scholarship recipients and research poster competition participants for
- 23 ASPCS.
- 24 • Provide support for up to three students per school and one resident per program for the
- 25 TAFP Student and Resident Summit in August in Grapevine.
- 26 • Reallocate funding slots not requested for the summit to allow more residents and students
- 27 from other schools and programs to attend.
- 28 • Reallocate support not used by leaders for interim and annual session to allow more funding
- 29 slots for the summit.

30 **MOTION: Adopt the recommendations listed above.**

31 **ACTION: Motion adopted.**

32
33 **National Conference recommendations**

- 34 • Maintain support for up to three students per school to attend national conference in
- 35 Kansas City at a rate of \$600 per student.
- 36 • Continue to reallocate funding slots not requested by a certain number of days before the
- 37 event to allow more students from other schools to receive support.

38
39 No motion needed, no changes.

40
41 **Travel reimbursement vs. scholarship for National Conference**

- 42 • Provide travel scholarships of \$600 for up to 48 Texas medical students who attend AAFP's
- 43 National Conference of Family Medicine Residents and Medical Students. No receipts will be
- 44 required. By giving them in person, staff can verify that they attended.

45
46 **MOTION: Adopt the recommendation listed above.**

47 **ACTION: Motion adopted.**

1 FINANCIAL UPDATE

2
3 Dr. Roland Goertz provided an overview of the TAFP finances. The travel funding approved increases
4 the expenses by almost \$50,000. The draft budget in the packet was a deficit budget, but Dr. Goertz
5 suggested adding income to make the budget aspirational and set a goal to increase income. He
6 issued a challenge to the Board of Trustees to double or increase their monthly donations to meet
7 that goal.

8
9 Kathy McCarthy provided an update on auditors. The TAFP Foundation audit is done along with the
10 TAFP audit. At the last meeting, getting alternate bids was discussed. Robert Montoya reached out
11 to several accounting firms that work with non-profits and none of them were able to bid on the
12 audit with the timeline needed. TAFP will try again.

13
14 **MOTION: Approve the 2024 fiscal year budget as proposed (Addendum 1).**

15 **ACTION: Motion adopted.**

16
17 Dr. Stephen Benold and Jordan Benold presented a report on the TAFP Foundation investments and
18 focused on real estate. The TAFP Foundation is invested in commercial real estate through a
19 diversified REIT fund. Dr. Benold shared the earnings of the fund over time. He said that REITs do
20 well in this environment – inflation allows landlords to raise rent and they have most of their debt
21 financed at a low rate, so the higher interest rates aren't affecting them as much. They believe
22 investing in REITs is a good idea right now.

23
24 They recommend reducing large cap by 2% and increasing real estate by 3% and taking treasury bills
25 down 1%.

26
27 **MOTION: Approve adjustments to the asset allocation to 8% large cap dividend stocks, 8% real**
28 **estate, 5% US large cap stock, 12% AMLP, 66% Treasury bills, 1% cash.**

29 **ACTION: Motion adopted.**

30
31 For the calendar year 2023, the TAFP Foundation saw a 3.6% rate of return on investments.

32 NOMINATING COMMITTEE

33
34
35 The Nominating Committee of Drs. Justin Bartos, Ashok Kumar, Lesca Hadley, and Dale Moquist
36 presented their recommendations for elections.

37
38 **MOTION: Re-elect the following Trustees for another three-year term.**

39
40 Douglas Curran, MD; Lewis Foxhall, MD; Roland Goertz, MD; Terrance Hines, MD; Shelley Kohlleppl,
41 MD; Erica Swegler, MD; Lloyd Van Winkle, MD.

42
43 **ACTION: Motion adopted.**

44
45 **MOTION: Elect the following for a three-year term as Trustees.**

46
47 Mary Nguyen, MD.

48
49 **ACTION: Motion adopted.**

1 **MOTION: Elect the following officers for one-year terms.**

2
3 President – Linda Siy, MD
4 Vice President – Bruce Echols, MD
5 Treasurer – Puja Sehgal, MD
6

7 **ACTION: Motion adopted.**

8
9 **SCHOLARSHIPS**

10 The packet includes a list of 2023 scholarship recipients. It also included the balances of scholarships
11 and endowments.
12

13
14 **RESEARCH**

15
16 Dr. Richard Young provided an update on research funded by the TAFP Foundation. There were two
17 reports of completed studies in the packet and three new applications to fund. Two were approved
18 for funding by the Research Grants Committee.
19

20 **OTHER BUSINESS**

21
22 Dr. Siy noted the cumulative and monthly donor reports included in the packet. Dr. Siy thanked all
23 the donors who have risen to new levels. Dr. Siy encouraged continued support for the monthly
24 donor program. The TAFP Foundation is on track for the most donations collected through the
25 monthly donor program in our history.
26

27 Dr. Siy thanked everyone who attended the dinner at Kirby's. Next year the meeting will be in The
28 Woodlands. Members were invited to submit ideas, but it was noted that the Kirby's in The
29 Woodlands has been a good venue for events in the past.
30

31 Dr. Donald Nino showed examples of wine and tumbler glasses that the TAFP Foundation could use
32 as a fundraiser. His wife has a business with engraving and agreed to donate her services to engrave
33 the glasses with the TAFP Foundation logo. The Board agreed to staff a table at next year at ASPCS
34 to provide them for a minimum donation during the Friday night reception and as an incentive for
35 those who buy tickets for the TAFP Foundation dinner.
36

37 Dr. Swegler remarked on how much the TAFP Foundation has grown since she got involved.
38

39 Dr. Dorcas Omari, one of the TAFP Family Medicine Resident Scholars, addressed the group about
40 her project involving remote blood pressure monitoring for patients at her residency location in
41 Lufkin.
42

43 Meeting adjourned at 11 a.m. by Linda Siy, MD.
44 Minutes submitted by Executive Director, Kathy McCarthy.

Texas Academy of Family Physicians Foundation
FY24 budget to actuals

Account ID	Description	FY22 Actual 31-Aug-22	FY23 Budget	FY23 Actual 31-Aug-23	FY24 Budget	FY24 Actual 29-Feb-24
	General Income					
40-300-00	Grants & Scholarships	\$ 100,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 40,000
40-302-00	Designated Gifts- Memorials	\$ 250			\$ -	
40-302-02	Designated Gifts-Resident Trav	\$ 780	\$ 750	\$ 1,050	\$ 750	\$ 830
40-302-03	Designated Gifts-StudentTravel	\$ 320	\$ 300	\$ 10	\$ 35,000	\$ 810
40-303-00	Designated Gifts- General					
40-304-00	Undesignated Gifts- General	\$ 41,019	\$ 42,000	\$ 44,355	\$ 45,000	\$ 27,225
40-308-00	Research Grants- Designated	\$ 270	\$ 250		\$ 250	\$ 60
40-317-00	Resident Scholars	\$ 16,750	\$ -	\$ 360		
40-322-10	Auction/Event Income	\$ 6,000	\$ 11,250	\$ 10,950	\$ 10,000	\$ 10,100
40-390-00	Other Income	\$ 5,647	\$ 250	\$ 38	\$ 250	\$ 40
	Interest and investment income	\$ 642	\$ -			
	Investment Income*		\$ 22,000	\$ 22,000	\$ 30,000	\$ 20,000
	Investment Income - Research*		\$ 6,600	\$ 6,600	\$ 6,633	\$ 6,713
	Investment Income - Student Interest*		\$ 7,000	\$ 7,000	\$ 7,080	\$ 7,171
	Investment Income - Resident Leadership				\$ 1,592	\$ 2,465
	Total General Income	\$ 171,678	\$ 170,400	\$ 172,363	\$ 216,555	\$ 115,414

* The budget reflects Investment Income of 4% of investments.

	General Expenses					
50-431-00	Travel- Staff				\$ -	
50-433-00	Food & Beverage	\$ 578	\$ 500	\$ 357	\$ 400	\$ -
50-455-00	Postage			\$ 74		
50-457-00	Printing	\$ 127	\$ 150		\$ 150	
50-480-00	Bank Charges	\$ 2,852	\$ 3,000	\$ 3,353	\$ 3,500	\$ 2,654
50-481-00	Local Property Taxes					
50-484-00	CPA & Audit	\$ 9,403	\$ 9,500	\$ 7,000	\$ 9,500	\$ 2,050
50-4870-00	Equipment rental		\$ 400	\$ 436	\$ 450	
50-557-00	Donation Recognition	\$ 7,182	\$ -		\$ 5,000	\$ 3,577
50-560-00	Auction/event expense	\$ 8,013	\$ 11,000	\$ 11,045	\$ 10,000	\$ 8,321
50-564-00	Medical Student Travel	\$ 33,774	\$ 40,000	\$ 49,123	\$ 60,000	\$ 6,713
50-564-10	Resident Travel Reimburse	\$ 8,013	\$ 15,000	\$ 14,047	\$ 30,000	\$ 6,390
50-567-00	Student Interest Groups	\$ 1,219	\$ 5,000	\$ 1,156	\$ 5,000	\$ 987
50-568-00	Research Grants	\$ 22,461	\$ 45,000	\$ 29,290	\$ 50,000	\$ 19,806
50-569-00	Fund Raising and Development				\$ -	
50-578-00	Research poster	\$ 2,261	\$ 3,300	\$ 1,200	\$ 3,300	\$ 2,700
50-580-00	Miscellaneous	\$ 16,629	\$ 17,000	\$ 19,174	\$ 17,000	\$ 8,248
50-556-03	Resident Scholars	\$ 14,229	\$ 20,500	\$ 16,500	\$ 20,500	\$ 4,300
	Total General Expenses	\$ 126,740	\$ 170,350	\$ 152,754	\$ 214,800	\$ 65,745

	Net profit - General	\$ 44,938	\$ 50	\$ 19,609	\$ 1,755	\$ 49,668
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**Texas Academy of Family Physicians Foundation
FY24 budget to actuals**

Account ID	Description	FY22 Actual 31-Aug-22	FY23 Budget	FY23 Actual 31-Aug-23	FY24 Budget	FY24 Actual 29-Feb-24
	Endowed Funds					
	Investment Income - scholarships*	\$ 70,000	\$ 70,000		\$ 70,000	\$ 70,000
	Total Endowed Fund Income	\$ 70,000	\$ 70,000		\$ 70,000	\$ 70,000

* The budget reflects Investment Income of 4% of investments.

Scholarship Expenses						
50-530-10	South Texas Scholarships		\$ 1,000	\$ 1,500	\$ 1,000	
50-530-11	Kolb Schlr Fnd- UTMB Galveston	\$ 2,289	\$ 2,300	\$ 2,292	\$ 2,300	
50-530-12	Porres Schlrshp- TX Tech Lubbk	\$ 1,700	\$ 1,700	\$ 1,700	\$ 1,700	
50-530-13	Prussner Schlrshp-UTHSC Housto	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	
50-530-14	Ross Schlrshp- UTSW Dallas	\$ 1,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,000
50-530-15	Post Schlrshp- UTHSC San Anton	\$ 1,800	\$ 1,800	\$ 1,000	\$ 1,800	
50-530-20	Krause Scholarship	\$ 2,000	\$ 2,300	\$ 2,250	\$ 2,300	
50-530-21	Thorek Schlrshp		\$ 1,200	\$ 1,100	\$ 1,200	
50-530-22	Valley Chapter Scholarship	\$ 5,000	\$ 9,000		\$ 9,000	
50-530-23	C. French Schlrshp	\$ 1,613	\$ 1,000	\$ 1,087	\$ 1,000	
50-530-24	Hartin Scholarship	\$ 633	\$ 1,200	\$ 1,245	\$ 1,200	
50-530-25	Nixon Scholarship	\$ 1,182	\$ 1,200	\$ 640	\$ 1,200	
50-530-26	LR Mabry Scholarship Fund	\$ 4,103	\$ 4,000	\$ 2,400	\$ 4,000	
50-530-27	Lancaster Scholarship	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
50-530-30	Jim Martin Scholarship fund		\$ 2,300		\$ 2,300	\$ 1,431
50-530-31	Cassie Murphy-Cullen, PhD Scholarsh	\$ 2,400	\$ 2,400	\$ 2,400	\$ 2,400	
	Boehm Scholarship		\$ 1,000	\$ 1,000	\$ 1,000	
	Mueller Scholarship	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	
50-545-00	Glen Johnson Minority Scholarship	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	
50-555-00	Roland Goertz Scholarship	\$ 1,200	\$ 1,200	\$ 1,152	\$ 1,200	
50-555-01	Leung Scholarship	\$ 2,000	\$ 2,000	\$ 2,300	\$ 2,000	
50-556-01	Bartos/Pillow Scholarship	\$ 3,500	\$ 3,800	\$ 3,900	\$ 3,800	
	Seth Cowan Scholarship	\$ 500	\$ 500	\$ 500	\$ 500	
50-555-02	Deuser Endowment	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
	Mettetal Scholarship	\$ 1,000	\$ 1,000	\$ 1,300	\$ 1,000	
	Dickey Scholarship		\$ 1,000	\$ -	\$ 1,000	
	Siy Scholarship			\$ -	\$ 1,000	
	Total Endowed Fund Expenses	\$ 42,420	\$ 54,400	\$ 40,266	\$ 55,400	\$ 4,431

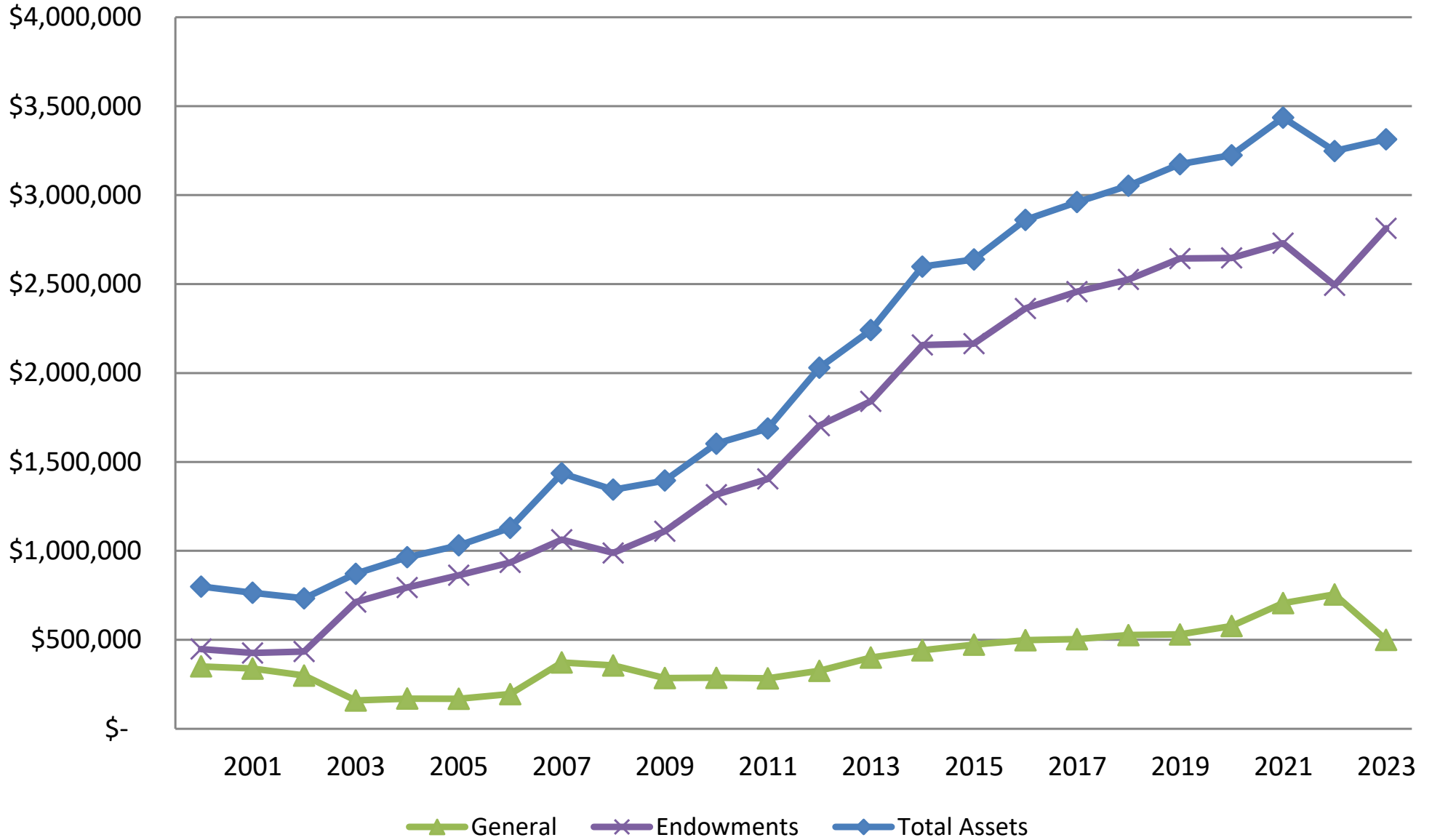
TAFP FND
Balance Sheet
February 29, 2024

		YTD FY24	YTD FY23	Net Change
ASSETS				
Current Assets				
10-106-00	Bank of Am Chkg	\$ 5,376.00	20,597.40	(15,221.40)
10-107-00	Bank of Am Savings	102,101.31	81,075.91	21,025.40
10-105-00	Fidelity MM Cash	22,128.88	80,387.73	(58,258.85)
10-109-00	Fidelity Bonds	2,190,588.47	2,075,507.00	115,081.47
10-111-00	Vanguard Value Ind Admiral	217,524.06	194,858.91	22,665.15
10-112-00	Vanguard REIT Admiral	296,054.28	168,366.42	127,687.86
10-114-00	ALPS ETPs TR Alerian	433,415.34	368,815.68	64,599.66
10-115-00	Fidelity Stocks	256,425.51	267,971.51	(11,546.00)
10-128-00	Accounts Receivable - Academy	0.00	40,000.00	(40,000.00)
	Total Current Assets	3,523,613.85	3,297,580.56	226,033.29
Property and Equipment				
	Total Property and Equipment	0.00	0.00	0.00
	Total Assets	\$ 3,523,613.85	3,297,580.56	226,033.29
 LIABILITIES AND CAPITAL				
Current Liabilities				
20-202-00	Accounts Payable - Academy	\$ 0.00	3,242.72	(3,242.72)
	Total Current Liabilities	0.00	3,242.72	(3,242.72)
	Total Liabilities	0.00	3,242.72	(3,242.72)
Capital				
30-221-00	Fund Balance	396,850.83	327,300.95	69,549.88
30-222-00	Restricted Principal-Schlrshps	1,819,303.00	1,819,303.00	0.00
30-225-00	Designated Scholarships	724,199.00	724,199.00	0.00
30-228-00	Fund Balance- Interest Schlrsp	367,481.00	367,481.00	0.00
	Net Income	215,780.02	56,053.89	159,726.13
	Total Capital	3,523,613.85	3,294,337.84	229,276.01
	Total Liabilities & Capital	\$ 3,523,613.85	3,297,580.56	226,033.29

TAFP Foundation Gifts to Endowed Funds by Fiscal Year

	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24
Kolb Scholarship	\$ 300										
Porres Scholarship					\$ 200	\$ 600	\$ 600	\$ 350			
Pruessner Scholarship	\$ 677	\$ 920	\$ 1,403	\$ 1,649	\$ 1,030	\$ 4,378	\$ 3,950	\$ 3,900	\$ 4,250	\$ 6,800	\$ 3,200
Ross Scholarship			\$ 250								
Post Scholarship											
S. Texas Schlr F TAFP					\$ 87	\$ 180	\$ 60		\$ 50	\$ 100	
Valley Chapter Scholarship											
Mueller Scholarship			\$ 3,215	\$ 2,550							
Thorek Scholarship											
Powell Scholarship											
C. French Scholarship											
Krause Scholarship	\$ 1,100	\$ 1,275	\$ 950	\$ 950	\$ 875	\$ 800	\$ 600	\$ 3,600	\$ 950	\$ 100	\$ 100
J.C. Martin Scholarship					\$ 175	\$ 1,420	\$ 385	\$ 140	\$ -		
LR Mabry Scholarship	\$ 2,250	\$ 2,600	\$ 2,500	\$ 2,400	\$ 2,400	\$ 200					
Johnson Scholarship	\$ 210	\$ 320	\$ 220	\$ 120	\$ 60	\$ 50	\$ 200	\$ 120	\$ 3,870	\$ 80	
Sam Nixon Scholarship											
Murphy-Cullen Scholarship	\$ 3,100	\$ 2,200	\$ 1,200	\$ 5,700	\$ 2,200	\$ 1,725	\$ 1,600	\$ 1,700	\$ 1,200	\$ 1,950	\$ 400
Lancaster Scholarship											
Hartin Scholarship	\$ 50		\$ 50	\$ 50		\$ 50	\$ 50	\$ 50			\$ 50
H.Boehm Scholarship	\$ 6,550	\$ 1,600	\$ 600	\$ 600	\$ 600	\$ 700	\$ 300	\$ 600	\$ 600	\$ 100	
R. Goertz Scholarship				\$ 1,800	\$ 300	\$ 720	\$ 720	\$ 970	\$ 1,020	\$ 1,470	\$ 910
Pillow/Bartos Scholarship	\$ 87,476					\$ 450	\$ 1,175	\$ 900	\$ 900	\$ 900	\$ 450
P. Leung Scholarship		\$ 50,000									
S. Cowan Scholarship				\$ 25,000						\$ 10,000	
T. Deuser Endowment			\$ 19,232	\$ 6,170	\$ 250						\$ 150
N. Dickey Scholarship				\$ 1,000	\$ 3,150	\$ 26,140	\$ 240	\$ 240	\$ 490	\$ 100	
Research Endowment	\$ 1,767	\$ 1,900	\$ 333	\$ 1,317	\$ 8,000	\$ 1,053	\$ 720	\$ 660	\$ 600	\$ 600	\$ 5,320
Student Interest Endowment	\$ 15,682	\$ 11,010	\$ 11,728	\$ 16,691	\$ 5,815	\$ 19,183	\$ 7,165	\$ 6,570	\$ 710	\$ 800	\$ 17,160
T. Mettetal Scholarship						\$ 30,000					
Resident Leadership Endowment										\$ 21,500	
L. Siy scholarship										\$ 27,030	\$ 2,350
	\$ 119,161	\$ 71,825	\$ 41,682	\$ 65,998	\$ 25,142	\$ 87,650	\$ 17,765	\$ 19,800	\$ 14,640	\$ 71,530	\$ 30,090

Assets by Year



TAFP Foundation Travel Funding 2024

Residents	Budget	Actual	Projected # funded	Actual funded
Annual session - leaders only	\$8,850	\$3,810	18	8
Annual session – research posters (estimate)	\$3,000	\$2,581	5 - 10	5
Interim session - leaders only	\$6,800		18	
Summit - 1 per program	\$16,100		40	
Summit - leaders	\$7,600		18	
National conference – Delegate and Alternate	\$2,400		2	
Travel scholarships (French, Thorek, Hartin, Nixon)	(\$5,000)			
	\$39,750	\$6,391	101 – 106	13
Students				
Annual session - leaders only*	\$5,850	\$2,424	13	8
Annual session - posters	\$0	\$3,032		9
Annual session - Scholarship recipients	\$2,500	\$1,106	7 - 10	4
Interim session - leaders only	\$4,500		13	
National conference - 3 per school	\$28,800		48	
National conference - Delegate and Alternate	\$2,400		2	
Summit - 3 per school	\$20,100		48	
Summit - leaders	\$6,600		16	
Travel scholarships (Mabry and Goertz)	(\$5,000)			
	\$65,750	\$6,562	145 – 147	21
*Note: There are 16 leader positions but in the current group, one student holds two positions and two matched out of state. We will have new leaders elected before the summit.				
Grand total for residents and students	\$105,500			



Texas Academy of Family Physicians Foundation
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MEMO

To: TAFP Foundation Board of Trustees

From: Kathy McCarthy, CAE on behalf of the Research Grants Committee

Date: April 4, 2024

Re: Research Update

Research in progress

Here are the research projects funded and in progress.

Funded 2023

Investigating Hormonal Influences on Pain and Stress Behavior using Longitudinal Adolescent Stress and Health Data

Chance R. Strenth, PhD, UT Southwestern

Preferences and Attitudes towards Telehealth among Individuals Attending Safety-Net Community Clinics in Houston Texas

Abayomi Ogunwale MD, MPH, McGovern Medical School

Implementation of a Hypertension Education Class at a Community-based clinic in an underserved urban area

Jonnae Atkinson, MD, Baylor College of Medicine

Development and validation of HITSS\$ screening tool for geriatric populations

Amer Shakil, MD, UT Southwestern

Reducing use of antibiotics without a prescription: testing of a stakeholder-driven, patient education intervention in primary care

Larissa Grigoryan, MD, PhD

Familias Contra Diabetes: Group Visits to Teach Self- Management Strategies to Diabetic Patients and Their Families

Stephanie Nguyen, DO

Funded 2022

Likelihood of Specialty Mental Health Treatment for Pediatric Patients Receiving Care within the Primary Care Behavioral Health Consultation Model

Yajaira Johnson-Esparza, PhD; Stacy Ogbeide, PsyD, UT San Antonio

A pilot project to manage chronic kidney disease in patients in the UTMB Family Medicine Island East Clinic by utilizing a chronic kidney disease patient navigator

Jamal Islam, MD, MS, UTMB Galveston – Note: Dr. Islam passed away in December. Dr. Quratulanne Jan has taken over as PI.

Funded 2021

Assessing adequacy of follow-up in patients with PHQ-9 screen-detected depression

Naveen Mahmood, MD, McGovern Medical School

How Family Medicine Physicians Can Demonstrate Accountability: an RRNeT Study

Richard Young, MD, JPS / RRNeT

Funded 2020

Understanding the impact of interpreted language on physician-patient relationship

Tharani Ravi, MD, UT San Antonio

Mobile Health Technology and Self-collected Sample for Cervical Cancer Screening Among Low-Income Women: A Pilot Study

Matthew Asare, PhD and Sally Weaver, MD

Dementia: Determining the Capacity Necessary to Designate a Surrogate

Sally Weaver, MD, McLennan County Medical Education and Research Foundation

Funded 2019

Long Acting Reversible Contraceptive Utilization and Attitudinal Beliefs: A Comparison of Centering Pregnancy Patients and Traditional Prenatal Care Patients in a Community Health Center

Zachary Sartor, MD, Waco Family Medicine Residency Program

Shared Care Model of Obesity Patients' Management

Saima Siddiqui, MD, MSCI, UT Health Science Center at San Antonio

Assessing the Efficacy of Targeted Home Visits for the Management of Chronic Conditions

Nora Gimpel, MD, UT Southwestern Medical Center

Improving intent to utilize the HPV Vaccine among Young Adults in a Primary Care Setting: Comparing healthcare provider levels and education styles

Shane Fernando, PhD, MS, FRSPH, University of North Texas Health Science Center

Funded 2017**Reduction in the incidence of Type 2 Diabetes through self-monitoring of blood glucose in patients with pre-diabetes - a Pilot Study***Fozia Ali, MD, UTHSC San Antonio***New proposals**

We received six new proposals. The committee is finalizing their decision.

Title	Amount requested
Primary Care Providers Knowledge of the Use of Narrative Medicine for Provider Wellness and Scholarship Engagement <i>Angel Ogbeide, DDS, Creighton University School of Dentistry</i>	\$8,100
Bridging the Gap: Enhancing Diagnosis of Skin Conditions in Diverse Skin Tones for Primary Care Physicians <i>Yun Shi, MD, PhD, UT Health San Antonio</i>	\$9,975
Understanding Clinicians' and Residents' Utilization of Telehealth in Family Medicine: An RRNeT Study <i>Maria Montanez Villacampa, MD, RRNeT/ UT Health San Antonio</i>	\$9,522
Exploring the Impact of Short-Term Continuous Glucose Monitoring on Long-Term Glycemic Management in Patient with Type 2 Diabetes <i>Chelsea Mendonca, MD, Baylor College of Medicine</i>	\$10,000
Improving Cancer Survivorship through Better Communications within Primary Care Systems <i>Wei-Chen Lee, PhD, MSPH, UTMB Galveston</i>	\$10,000
Texas Two-Step: Evaluation of two-part blood pressure screen during mass pre-participation physical exams in detection of pediatric hypertension <i>Namita Bhardwaj, MD, MS, MPH, UTMB Galveston</i>	\$10,000



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MEMO

To: TAFP Foundation Board of Trustees

From: Kathy McCarthy, Executive Director

Date: April 4, 2024

Re: Nominating Committee

It is time to elect members to serve as the 2024 Nominating Committee. Please do not volunteer for the Nominating Committee if you are interested in serving as an officer.

For reference below are the past committees:

2023 – Lesca Hadley, MD, Justin Bartos, MD, Ashok Kumar, MD, Dale Moquist, MD.

2022 – Lesca Hadley, MD, Justin Bartos, MD, Ashok Kumar, MD, Bruce Echols, MD, Dale Moquist, MD, and Amer Shakil, MD

2021 – Lesca Hadley, MD, Justin Bartos, MD, Ashok Kumar, MD, Bruce Echols, MD, Dale Moquist, MD, and Amer Shakil, MD

2020 – Justin Bartos, MD, Ashok Kumar, MD, Bruce Echols, MD, Dale Moquist, MD, and Amer Shakil, MD

2019 – Justin Bartos, MD, Ashok Kumar, MD, Bruce Echols, MD, and Amer Shakil, MD

2018 – Justin Bartos, MD, Ashok Kumar, MD, Bruce Echols, MD, and Amer Shakil, MD

2017 – Justin Bartos, MD, Ashok Kumar, MD, and Bruce Echols, MD

2016 – Justin Bartos, MD, Ashok Kumar, MD, and Bruce Echols, MD

2015 – Justin Bartos, MD, Ashok Kumar, MD, and Bruce Echols, MD

New Pins for 2024

Visionary (\$50,000+)

None

Pioneer (\$25,000 - \$49,000)

Mary Nguyen, MD

Lloyd Van Winkle, MD

Lewis Foxhall, MD

Trailblazer (\$10,000 - \$24,999)

Joshua Splinter, MD

Clare Arnot Hawkins, MD, FAAFP

Amer Shakil, MD, MBA & Khalida Yasmin, MD

Partner (\$6000-\$9999)

None

Patron (\$2,500 - \$5999)

Michael Alan Altman, MD, FAAFP

Luis Manuel Benavides, MD, FAAFP

Yanqiu Zhao, MD

Sustainer (\$1000-\$2499)

Chris Casso, MD

Stephanie H Elmore, MD

John Harlan Haynes, MD, MS, FAAFP

Odetta Mohamed-Santa, MD, FAAFP

Friend (\$500 - \$999)

Jonnae Olivia Atkinson, MD, FAAFP

Vicky Bakhos Webb, MD, MBA, FAAFP

Donald A Briscoe, MD, FAAFP

Michael Andrew Cooper, MD

William Michael McBroom, MD, FAAFP

Li-Yu Huang Mitchell, MD, FAAFP

Ikemefuna Charles Okwuwa, MD, FAAFP

Karen V Smith, MD, MEd, FAAFP

Erin L Wright, MD

Thank You to the TAFP Foundation Monthly Donors

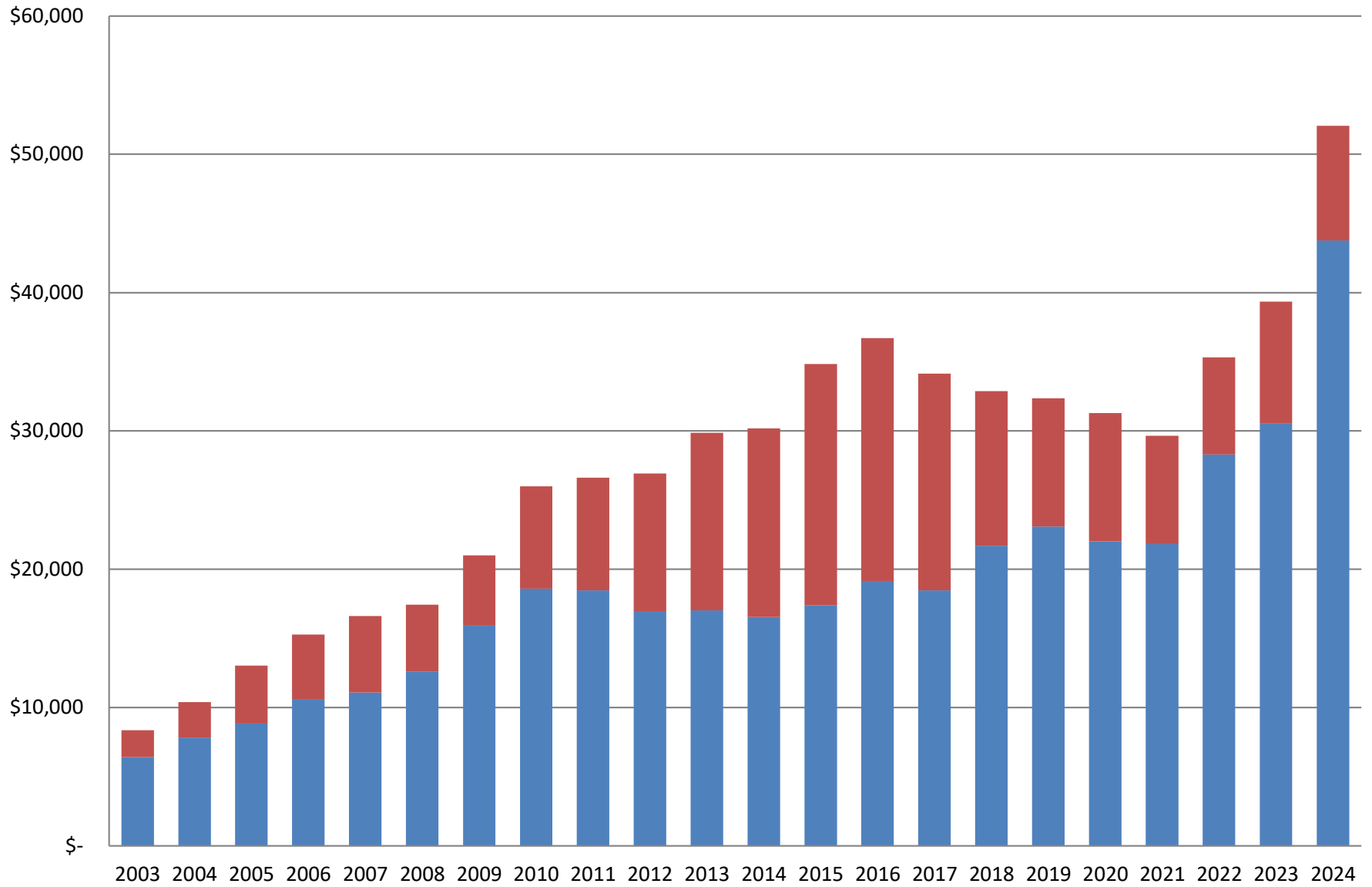
Jonnae Atkinson, MD
 Vicky Bakhos Webb, MD
 Madhumita Banga, MD
 Tom Banning
 Lynda Barry, MD
 Justin V. Bartos, MD
 Stephen Benold, MD
 Lindsay Botsford, MD
 Emily Briggs, MD
 Chris Casso, MD
 Lillian Chan, MD
 C. Mark Chassay, MD
 Kenneth Davis, MD, CPE
 Chrisette Dharma, MD
 Jorge Duchicela, MD
 Bruce Echols, MD
 Antonio Falcon, MD
 Troy Fiesinger, MD
 Triwana Fisher-Wikoff, MD
 Aimee Lyn Fournoy, MD
 Lewis Foxhall, MD
 Lisa Glenn, MD
 Roland Goertz, MD
 Tove Goldson, MD, PhD
 T. David Greer, MD

Ajay Gupta, MD
 Natalia Gutierrez, MD
 Lesca Hadley, MD
 Rebecca Hart, MD
 Clare Hawkins, MD
 Jay Haynes, MD, MS
 Terrance S Hines, MD
 Farron Hunt, MD
 Janet Hurley, MD
 Brian D Jones, MD
 David Katerndahl, MD
 Shelley Kohlleppe, MD
 C. Tim Lambert, MD
 Eric Ted Lee, MD
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Shelly Roaten, MD
 Rashmi Rode, MD
 Alan Rosani Yves, MD
 Sarah Samreen, MD
 David Paul Sanner, MD
 David Schneider, MD
 M. Sandra Scurria, MD
 Dan Sepdham, MD
 Amer Shakil, MD
 Linda Siy, MD
 Karen V. Smith, MD
 Mary Spalding, MD
 Joshua Splinter, MD
 Charles Stern, MD
 Sharon Stern, MD
 Paul and Erica Swegler, MD
 Lloyd Van Winkle, MD
 David Vaughan, MD
 Sally P. Weaver, MD
 Erin Wright, MD
 Khalida Yasmin, MD
 Robert Youens, MD
 Richard Young, MD

**Not on the list? See the TAFP Foundation staff for
 information on becoming a monthly donor**

Monthly Donations by Year and Designation



*2024 estimated based on Jan-March donations

■ General

■ Endowed Funds

Scholarships & Endowments

	8/31/2022 Balance at audit	FY23 Donations & Transfers	Appreciation	FY23 Payouts & Reductions	8/31/2023 balance at audit	FY24 Payout allowed
Valley Chapter	\$ 239,529		\$ 11,572	\$ -	\$ 251,101	\$ 10,044
Student Interest Endowment	\$ 177,009	\$ 800	\$ 8,550	\$ 7,080	\$ 179,280	\$ 7,171
Pruessner	\$ 170,212	\$ 6,800	\$ 8,221	\$ 6,000	\$ 179,235	\$ 7,169
Research Endowment	\$ 165,847	\$ 600	\$ 8,010	\$ 6,632	\$ 167,825	\$ 6,713
Mabry	\$ 111,811		\$ 5,400	\$ 2,400	\$ 114,813	\$ 4,593
Bartos / Pillow	\$ 98,298	\$ 900	\$ 4,748	\$ 3,900	\$ 100,047	\$ 4,002
Martin	\$ 64,857		\$ 3,133		\$ 67,990	\$ 2,720
Murphy-Cullen	\$ 62,911	\$ 1,950	\$ 3,039	\$ 2,400	\$ 65,500	\$ 2,620
Ross	\$ 61,936		\$ 2,992	\$ 2,000	\$ 62,928	\$ 2,517
Krause (Tarrant County)	\$ 61,180	\$ 100	\$ 2,955	\$ 2,250	\$ 61,986	\$ 2,479
Resident Leadership Endowment	\$ 39,802	\$ 21,500	\$ 1,922	\$ 1,592	\$ 61,633	\$ 2,465
Kolb	\$ 57,336		\$ 2,769	\$ 2,292	\$ 57,814	\$ 2,313
Leung	\$ 52,793		\$ 2,550	\$ 2,300	\$ 53,043	\$ 2,122
Goertz	\$ 46,463	\$ 1,470	\$ 2,244	\$ 1,152	\$ 49,026	\$ 1,961
Post	\$ 44,738		\$ 2,161	\$ 1,000	\$ 45,899	\$ 1,836
Johnson Minority	\$ 43,742	\$ 80	\$ 2,113	\$ 1,500	\$ 44,435	\$ 1,777
Nixon	\$ 42,045		\$ 2,031	\$ 640	\$ 43,436	\$ 1,737
Porres	\$ 42,587		\$ 2,057	\$ 1,700	\$ 42,944	\$ 1,718
Lancaster	\$ 41,242		\$ 1,992	\$ 1,000	\$ 42,234	\$ 1,689
Boehm	\$ 40,970	\$ 100	\$ 1,979	\$ 1,000	\$ 42,049	\$ 1,682
South Texas Chapter	\$ 39,998	\$ 100	\$ 1,932	\$ 1,500	\$ 40,530	\$ 1,621
Hartin	\$ 39,181		\$ 1,892	\$ 1,245	\$ 39,829	\$ 1,593
Cowan	\$ 28,142	\$ 10,000	\$ 1,359	\$ 500	\$ 39,002	\$ 1,560
Dickey	\$ 35,512	\$ 100	\$ 1,715	\$ -	\$ 37,328	\$ 1,493
Thorek	\$ 35,402		\$ 1,710	\$ 1,100	\$ 36,012	\$ 1,440
Mettetal	\$ 31,873		\$ 1,539	\$ 1,300	\$ 32,113	\$ 1,285
Mueller	\$ 28,327		\$ 1,368	\$ 1,000	\$ 28,695	\$ 1,148
French	\$ 28,264		\$ 1,365	\$ 1,087	\$ 28,542	\$ 1,142
Deuser	\$ 27,130		\$ 1,310	\$ 1,000	\$ 27,441	\$ 1,098
Siy	\$ -	\$ 27,030	\$ -	\$ -	\$ 27,030	\$ 1,081
Powell	\$ 10,018		\$ 484		\$ 10,502	
Totals	\$ 1,969,155	\$ 71,530	\$ 95,113	\$ 55,570	\$ 2,080,242	\$ 83,210



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MEMO

To: TAFP Foundation Board of Trustees

From: Kathy McCarthy, Executive Director

Date: April 4, 2024

Re: Annual Session Activities

We have several opportunities for fundraising and visibility for the work of the Foundation at the 2024 Annual Session and Primary Care Summit at The Woodlands Waterway Marriott.

- The Board of Trustees meeting will need to be on Friday instead of Saturday this year. We plan to start just after TAFP’s Member Assembly breakfast on Friday, Nov. 8.
- We will have a table near the bar to solicit new monthly donors and thank existing donors with a special engraved glass.
- Plan on attending a fundraising dinner on Friday, Nov. 8. Unless there is an objection, I think the fundraiser should be focused on student or resident travel.
- We will continue with our past activities of honoring a philanthropist of the year and scholarship recipients at the TAFP Awards Lunch, inviting researchers to present, collecting donations with registration, having a VIP area for a special donation, and doing a TAFP Foundation update in the general session.