

TAFP FOUNDATION BOARD OF TRUSTEES

Saturday, November 15, 2025

9:15 – 11:45 a.m. CST

Lalique I, Renaissance Dallas Addison 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 April 4, 2025
4. Current Business
 - A. Resident scholars – Ryan Craig, DO and Corynne McEachern, DO
 - B. Student and resident travel funding
 - C. Financial Report
 - i. Approval of FY26 budget – Lloyd Van Winkle, MD
 - iii. Investment report – Stephen Benold, MD, and Jordan Benold
 - D. Nominating Committee
 - i. Election of Board members
 - ii. Election of officers
 - E. Geriatrics endowment proposal
 - F. Activities at 2025 Annual Session & Primary Care Summit
 - G. Research – Richard Young, MD
 - i. New proposals
 - ii. Final reports
5. Information Items
 - A. Cumulative Donors and Monthly Donors
 - B. Scholarships
6. Other Business
7. Adjourn

TAFP Foundation Board of Trustees

November 2025

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Full Name	Position	City
Linda Marie Siy, MD, FAAFP	President	Fort Worth
Rebecca Eileen Hart, MD, FAAFP	Vice President	Fredericksburg
Lloyd Van Winkle, MD, FAAFP	Treasurer	San Antonio
Justin V Bartos, MD, FAAFP	Trustee	Bedford
Adrian Billings, MD, PhD, FAAFP	Trustee	Alpine
Emily D Briggs, MD, MPH, FAAFP	Trustee	New Braunfels
Samuel T Coleridge, DO	Trustee	Fort Worth
Douglas W Curran, MD, FAAFP	Trustee	Athens
Bruce Alan Echols, MD, FAAFP	Trustee	Dallas
Tricia C Elliott, MD, FAAFP	Trustee	Fort Worth
Lewis Emory Foxhall, MD, FAAFP	Trustee	Houston
Roland Goertz, MD, MBA, FAAFP	Trustee	Waco
Lesca C Hadley, MD, FAAFP	Trustee	Cleburne
Terrance S Hines, MD, FAAFP	Trustee	Austin
Shelley Kohlleppe, MD	Trustee	Lakehills
Kaparaboyana Ashok Kumar, MD, FAAFP	Trustee	San Antonio
Cyrus Timothy Lambert, MD, FAAFP	Trustee	Rowlett
Eric Ted Lee, MD, FAAFP	Trustee	Bellaire
Javier D Margo, MD, FAAFP	Trustee	Rio Grande City
Dale C Moquist, MD, FAAFP	Trustee	Horseshoe Bay
Mary Suzanne Nguyen, MD, FAAFP	Trustee	Castroville
Donald R Nino, MD, FAAFP	Trustee	Houston
David Schneider, MD, FAAFP	Trustee	Dallas
Puja Anil Sehgal, MD	Trustee	Sugar Land
Richard A Young, MD	Trustee	Fort Worth
Yoana E Flores	Student Advisor	Laredo
Jacob Oliver, MD	Resident Advisor	Terrell
Lane J. Aiena, MD, FAAFP	Ex Officio	Huntsville
Sarah O Ashitey, MD, FAAFP	Ex Officio	Dallas
Lindsay K. Botsford, MD, FAAFP	Ex Officio	Houston
Jessica Nu Glick, DO, FAAFP	Ex Officio	Bellaire
Madeline Elise Hazle, MD	Ex Officio	Floresville
Amanda Mohammed-Strait, MD, FAAFP	Ex Officio	Rowlett
Ikemefuna Charles Okwuwa, MD, FAAFP	Ex Officio	Odessa
Sherri D. Onyiego, MD, PhD, FAAFP	Ex Officio	Houston
Rashmi Rode, MD, FAAFP	Ex Officio	Houston
Brittany Uebbing	Ex Officio	Round Rock

TAFP FOUNDATION BOARD OF TRUSTEES

Date: April 4, 2025

Members participating:

Adrian Billings, MD, PhD, FAAFP
 Emily D Briggs, MD, MPH, FAAFP
 Douglas Curran, MD, FAAFP
 Roland Goertz, MD, MBA, FAAFP
 Lesca C Hadley, MD, FAAFP
 Rebecca Hart, MD, FAAFP
 Terrance S Hines, MD, FAAFP
 Eric Lee, MD, FAAFP
 Javier D. Margo, MD, FAAFP
 Adam Mendonca, MD, Resident Advisor
 Dale C Moquist, MD, FAAFP
 Mary Nguyen, MD, FAAFP
 Donald Nino, MD, FAAFP
 Puja Sehgal, MD
 Linda Marie Siy, MD, FAAFP
 Erica W. Swegler, MD, FAAFP
 Paul Swegler
 Richard Young, MD
 Lane Aiena, MD, FAAFP, Ex Officio
 Sarah Ashitey, MD, FAAFP, Ex Officio
 Lindsay Botsford, MD, FAAFP, Ex Officio
 Jessica Glick, DO, Ex Officio
 Madeline Hazle, MD, Ex Officio
 Shreya Mallena, Ex Officio
 Rashmi Rode, MD, FAAFP, Ex Officio

Others participating:

Kathy McCarthy- Staff
 Robert Montoya – Staff
 Stephen Benold, MD – Investment Advisor
 Timothy Heinz – Texas Family Medicine Research Journal
 Melanie Diaz, DO, Resident Scholar
 Kristie Tu, MD, Resident Scholar

CALL TO ORDER

The meeting was held at Kalahari Resorts and Conventions. It was called to order at 1:15 p.m.

ROUTINE BUSINESS

The minutes of the November 8, 2024, meeting were approved without modification.

FAMILY MEDICINE RESIDENT SCHOLARS PROGRAM

Dr. Siy shared the names of the new scholars selected – Dr. Corynne McEachern and Dr. Ryan Craig. The interview committee this year included Dr. Linda Siy, Dr. Jake Margo, Dr. Lloyd Van Winkle, and Kathy McCarthy. Dr. Siy thanked the members who reviewed applications in the first round of the process. Those volunteers included Drs. Jessica Glick, Puja Sehgal, Mary Nguyen, Donald Nino, Richard Young, Lesca Hadley, and Paul Swegler.

The resident scholars selected in 2024 - Dr. Melanie Diaz and Dr. Kristie Tu presented on their projects. Dr. Diaz is focusing on addressing teen pregnancy in the Waco area and Dr. Tu is working on staying connected with economically disadvantaged patients by providing cell phone access.

FINANCIAL UPDATE

Dr. Lloyd Van Winkle provided an overview of the TAFP Foundation finances. Six months into the fiscal year, we're on track to meet our expense budget.

Dr. Stephen Benold presented a report on the TAFP Foundation investments. The annual rate of return for the calendar year 2024 was 8.5%. He noted that 2/3 of the assets are in US Treasury bills. There were no changes made to the asset allocation, but he will rebalance the portfolio.

TRAVEL FUNDING

Kathy McCarthy provided a brief update on travel funding. The new structure is in place providing travel funding for resident and student leaders for Annual Session and Interim Session with most of the funding allocated for the TAFP Student and Resident Summit in August and AAFP's FUTURE (previously National Conference). The funding for in state meetings is now determined by geography with those living further from the meeting having access to more funding. Any leader funding not used will be reallocated for additional spots for the summit. The TAFP Foundation budget includes \$100,000 in travel funding.

RESEARCH

Dr. Richard Young provided an update on research funded by the TAFP Foundation. There were eight new proposals for this cycle. The committee decided to fund three. Dr. Young made an appeal for an additional reviewer to help him and Dr. Bruce Echols with research grant reviews and Dr. Lesca Hadley volunteered to help with the next cycle. The agenda packet included final reports from three researchers.

In place of Dr. Larry Kravitz, Tim Heinz presented on the new Texas Family Medicine Research Journal that is being organized to provide additional opportunities for publication for Texas family medicine research. The TAFP Foundation will help with collecting donations until the journal is established and approved for 501c3 status with the IRS.

PHILANTHROPIST OF THE YEAR

In 2024, the decision was made to create a nomination process and not necessarily give the award every year to make it more meaningful. A draft nomination form was provided in the packet to allow nominations for this award. No changes were made and the consensus was to continue with the

Executive Committee serving as the selection committee for the award. The award opportunity will be publicized with TAFP awards.

NOMINATING COMMITTEE

Each year a Nominating Committee is elected at Interim Session and presents nominations for officers and trustees at the Annual Session.

MOTION: Elect Justin Bartos, MD, Ashok Kumar, MD, Rebecca Hart, MD, and Lesca Hadley, MD, as the Nominating Committee for 2025.

ACTION: Motion adopted.

TAFP SCHOLARSHIPS

During TAFP's Annual Session and Primary Care Summit, the longtime executive director for the Harris County Academy of Family Physicians passed away. The chapter worked with the Executive Committee to quickly establish a scholarship to allow donations. A scholarship agreement was included in the agenda packet. Dr. Donald Nino provided an update on the development of the fund. The chapter has a CD that will be maturing soon, and they will use that for a matching campaign to fund the scholarship.

CONFLICT OF INTEREST POLICY

The TAFP Foundation does not have a conflict of interest policy and that is a question on the IRS 990 form each year. A draft policy modeled on TAFP's COI policy was included in the agenda packet.

MOTION: Adopt proposed Conflict of Interest Policy (attachment 1).

ACTION: Motion adopted.

OTHER BUSINESS

Dr. Siy noted the cumulative and monthly donor reports included in the packet. Dr. Erica Swegler and Dr. Donald Nino provided a demonstration of a bingo game that could be used for a Foundation event in the future.

Paul and Dr. Erica Swegler were recognized for their many years of service on the Board of Trustees. They plan to relocate outside of Texas for a year and will resign from the Board.

Meeting adjourned at 2:40 p.m. by Linda Siy, MD.

Minutes submitted by Executive Director, Kathy McCarthy.



Texas Academy of Family Physicians Foundation
 12012 Technology Blvd, Suite 200
 Austin, Texas 78727
 (512) 329-8666 / (512) 329-8237

MEMO

To: TAFP Foundation Board of Trustees

From: Kathy McCarthy, CAE, Executive Director

Date: November 1, 2025

Re: Update on Resident Scholars program

The program has been in place since 2020 and is doing great. Our two most recent scholars are planning to join us in Addison to discuss their projects.

Here is a reminder of what the program provides:

- \$2,500 stipend during first year of residency
- Travel support to attend TAFP's Annual Session and Primary Care Summit and C. Frank Webber Lectureship and Interim Session during their second year of residency.
- \$2,500 stipend at the end of their second year of residency.
- Travel support to attend AAFP's Congress of Delegates and National Conference of Constituency Leaders in their third year of residency.
- \$5,000 stipend at the end of their third year of residency.

Here is a recap on our scholars:

2020 Kendra Williams, MD – completed residency in 2022, practicing in Knox City, TX.
 Represented Texas at NCCL in 2025.

2021 Tyler King, DO – completed residency in 2023. Practicing in Laredo and serving on the Laredo City Council

2022 Carmella DeSerto, MD – completed residency in 2024. Practicing in San Antonio with UT Health. Represented Texas at NCCL in 2025.
 Gerardo Rodriguez, MD – completed residency in 2024. Working at Health Services of North Texas in Denton.

2023 Madeline Huff, MD – completed residency in 2025. Is working for WellMed in Austin.
 Dorcas Omari, MD – completed residency in 2025. Working at First Primary Care in The Woodlands

- 2024 Kristie Tu, MD – Third year resident in Sugar Land. Enrolled in TAFP’s Resident Leadership Experience.
Melanie Diaz, DO – Third year resident in Waco.
- 2025 Corynne McEachern, DO – Second year resident at UT Health in San Antonio
Ryan Craig, DO – Second year resident at Methodist Charlton in Dallas



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MEMO

To: TAFP Foundation Board of Trustees

From: Kathy McCarthy, CAE and Juleah Williams

Date: October 30, 2025

Re: TAFP Foundation Travel Funding for Residents and Students

This was our second year under the funding structure, and it continues to work reasonably well. This year, we established a deadline to register for the conference after they receive funding approval. If the student or resident did not register, their funding was reallocated to another student or resident. We provided more than \$50,000 in funding for students and residents to attend the Summit in August and provided scholarship checks to 46 medical students to attend AAFP's FUTURE (formerly National Conference) plus we continue to fund the resident and student delegate and alternate delegate with reimbursement at a higher rate.

With our experience, we suggest creating a little more structure for allowable expenses for in-state meetings. We have limits based on geographic distance, but no other guidelines in place. We would like to create a travel funding FAQ to share with recipients and put guidelines in place on rental cars, limit mileage reimbursement, and hotel nights specifically for travel to the Student and Resident Summit. The FAQ will include general information about the purpose of travel reimbursement being to reduce the barriers to participation in conferences, encouragement to pool resources by carpooling and room sharing with fellow students and residents, and a reminder that this funding is made possible by the generous donations of family physicians.

Mileage reimbursement

The TAFP Foundation reimburses mileage at the maximum IRS approved rate – currently .70 per mile. We had mileage claims up to \$880 for the Summit this year. For some attendees, it would be more cost-effective to fly, and we don't verify that they are driving their personal vehicle. **We recommend limiting mileage reimbursement to \$300.** I don't think there is anywhere in Texas where you need more than that to pay for gas to and from.

Rental car reimbursement

We have not had clear policy on rental cars. In some cases, it can be more cost effective than driving a personal vehicle and claiming mileage reimbursement, so we want to allow it, but with limitations. **We recommend limiting the rental car reimbursement to three days, economy, compact, or mid-sized vehicles, and only for those not being reimbursed for**

airfare. Further we will state in the FAQ that if renting a vehicle, they can request gas reimbursement but not mileage.

Hotel reimbursement

While most attendees asked for reimbursement for one or two nights, we did have a few that seemed to add on residency visits, rotations, or vacation and included additional nights. **We recommend establishing a maximum of two nights at the hotel unless pre-approved by staff.**

Below you can see our totals for FY24 and FY25. Oddly, we reimbursed exactly the same number of students and residents over the course of the year!

TAFP Foundation Travel Funding				
Residents	FY 24 Actual	FY 25 Actual	Actual funded FY24	Actual funded FY25
Annual session - leaders	\$3,810	\$4,585	8	9
Annual session – research posters (estimate)	\$2,581	\$2,156	5	6
Interim session - leaders only	\$1,773	\$1,168	2	2
Summit - 1 per program	\$16,207	\$18,005	38	40
Summit - leaders	\$5,012	\$2,693	11	7
National conference – Delegate and Alternate	\$2,400	\$2,400	2	2
Travel scholarships (French, Thorek, Hartin, Nixon)	(\$4,449)	(\$4,585)		
	\$27,334	\$26,422	66	66
Students				
Annual session - leaders	\$2,424	\$2,605	8	5
Annual session - posters	\$3,417	\$4,127	9	10
Annual session - Scholarship recipients	\$1,106	\$1,258	4	4
Interim session - leaders only	\$587	\$0	2	0
National conference - 3 per school	\$27,000	\$27,600	45	46
National conference - Delegate and Alternate	\$2,184	\$2,400	2	2
Summit - 3 per school	\$22,831	\$25,876	69	70
Summit - leaders	\$2,719	\$3,686	8	10
Travel scholarships (Mabry and Goertz)	(\$2,184)	(\$6,000)		
	\$60,084	\$61,552	147	147



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MEMO

To: TAFP Foundation Board of Trustees

From: Kathy McCarthy, CAE, Executive Director

Date: November 6, 2025

Re: Financial update

We are waiting for the FY25 audit to be completed. Once we have a draft, it will be sent to all trustees for review. I was able to get the worksheet for endowments to update the investment income reflected in the scholarship report in 5.B. Scholarships and to use for budgeting.

Just a reminder that all contributions designated for endowments are permanently restricted. We don't include them in the budget. By our policy, we can spend up to 4% of scholarships and other endowments each year. The endowments for research, student interest, resident leadership and TAFP fund endowments are included in the general income to help fund our grants, travel funding, and FMIG activities.

A few notes:

- TAFP continues to provide an \$80,000 grant each year to the TAFP Foundation. In addition, TAFP provides in-kind support through the TAFP staff time spent on Foundation operations.
- The fundraising dinner last year and this year were set to benefit medical student travel. The event sponsorships were all coded to that part of the budget with ticket sales reflected as "event income".
- While we didn't turn anyone down for travel funding for the TAFP Summit, not all funding was utilized.
- With projected individual donations, continued TAFP support, and the endowment income, I was able to create a balanced budget.

Texas Academy of Family Physicians Foundation
FY26 Proposed Operating Budget

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	Description	FY23 Actual 31-Aug-23	FY24 Actual 31-Aug-24	FY25 Budget	FY 25 Actual 31-Jul-25	FY26 Budget
	General Income					
1	Grants & Scholarships	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000
2	Designated Gifts- Memorials				\$ 500	
3	Designated Gifts-Resident Trav	\$ 1,050	\$ 1,600	\$ 1,500	\$ 1,140	\$ 1,500
4	Designated Gifts-StudentTravel	\$ 10	\$ 9,700	\$ 12,000	\$ 37,023	\$ 38,000
5	Designated Gifts- General					
6	Undesignated Gifts- General	\$ 44,355	\$ 55,385	\$ 58,000	\$ 50,099	\$ 53,000
7	Research Grants- Designated		\$ 120	\$ 200	\$ 120	\$ 120
8	Resident Scholars	\$ 360				
9	Auction/Event Income	\$ 10,950	\$ 10,100	\$ 24,000	\$ 8,975	\$ 8,500
10	Other Income	\$ 38	\$ 40	\$ 50	\$ 6,340	\$ 2,500
11	Interest and investment income					
12	General investment Income*	\$ 22,000	\$ 20,000	\$ 21,494	\$ 21,494	\$ 21,494
13	Investment Income - Research*	\$ 6,600	\$ 6,713	\$ 7,287	\$ 7,287	\$ 7,433
14	Investment Income - Student Interest*	\$ 7,000	\$ 7,171	\$ 8,240	\$ 8,240	\$ 8,682
15	Investment Income - Resident Leadership*		\$ 2,465	\$ 2,596	\$ 2,596	\$ 2,645
16	Investment income - TAFP Fund*			\$ 40,000	\$ 40,000	\$ 40,751
17	Total General Income	\$ 172,363	\$ 193,293	\$ 255,367	\$ 263,814	\$ 264,625

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

	General Expenses					
18	Travel- Staff				\$ -	\$ -
19	Food & Beverage	\$ 357	\$ -	\$ 300	\$ -	\$ -
20	Postage	\$ 74			\$ -	\$ -
21	Printing			\$ 150	\$ -	\$ -
22	Bank Charges	\$ 3,353	\$ 5,465	\$ 5,500	\$ 4,172	\$ 4,500
23	Local Property Taxes					
24	CPA & Audit	\$ 7,000	\$ 18,125	\$ 15,000	\$ 21,420	\$ 22,000
25	Equipment rental	\$ 436		\$ 450	\$ 2,741	\$ 2,500
26	Donation Recognition		\$ 3,577	\$ -	\$ -	
27	Auction/event expense	\$ 11,045	\$ 8,321	\$ 9,500	\$ 8,611	\$ 8,500
28	Medical Student Travel	\$ 49,123	\$ 57,899	\$ 60,000	\$ 57,130	\$ 60,000
29	Resident Travel Reimburse	\$ 14,047	\$ 26,022	\$ 30,000	\$ 33,110	\$ 34,000
30	Student Interest Groups	\$ 1,156	\$ 2,140	\$ 4,000	\$ 107	\$ 1,500
31	Research Grants	\$ 29,290	\$ 49,328	\$ 70,000	\$ 70,000	\$ 76,000
32	Fund Raising and Development					
33	Research poster	\$ 1,200	\$ 2,700	\$ 3,300	\$ 1,200	\$ 1,200
34	Investment Management	\$ 19,174	\$ 19,550	\$ 25,000	\$ 23,607	\$ 25,000
35	Resident Scholars	\$ 16,500	\$ 26,713	\$ 29,200	\$ 26,204	\$ 29,000
36	Total General Expenses	\$ 152,754	\$ 219,840	\$ 252,400	\$ 248,302	\$ 264,200
37						
38	Net Profit - General	\$ 19,609	\$ (26,547)	\$ 2,967	\$ 15,513	\$ 425

TAFP Foundation General Trustees, AS2025

Texas Academy of Family Physicians Foundation
FY26 Proposed Operating Budget

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Description		FY23 Actual 31-Aug-23	FY24 Actual 31-Aug-24	FY25 Budget	FY 25 Actual 31-Jul-25	FY26 Budget
Endowed Fund Expenses						
1	South Texas Scholarships	\$ 1,500	\$ 1,500	\$ 1,000	\$ 950	\$ 1,000
2	Kolb Schlr Fnd- UTMB Galveston	\$ 2,292	\$ 2,298	\$ 2,300	\$ 2,430	\$ 2,300
3	Porres Schlrshp- TX Tech Lubbk	\$ 1,700	\$ 1,700	\$ 1,700	\$ 1,800	\$ 1,700
4	Prussner Schlrshp-UTHSC Housto	\$ 6,000	\$ 6,000	\$ 6,000		\$ 6,000
5	Ross Schlrshp- UTSW Dallas	\$ 2,000	\$ 1,000	\$ 2,000	\$ 2,000	\$ 2,000
6	Post Schlrshp- UTHSC San Anton	\$ 1,000	\$ -	\$ 1,800		\$ 1,800
7	Krause Scholarship	\$ 2,250	\$ 2,500	\$ 2,300	\$ 2,500	\$ 2,300
8	Thorek Schlrshp	\$ 1,100	\$ 1,100	\$ 1,200	\$ 937	\$ 1,200
9	Valley Chapter Scholarship		\$ 6,000	\$ 9,000	\$ 3,000	\$ 9,000
10	C. French Schlrshp	\$ 1,087	\$ 1,000	\$ 1,000	\$ 1,350	\$ 1,000
11	Hartin Scholarship	\$ 1,245	\$ 1,149	\$ 1,200	\$ 1,099	\$ 1,200
12	Nixon Scholarship	\$ 640	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200
13	LR Mabry Scholarship Fund	\$ 2,400	\$ -	\$ 4,000	\$ 4,800	\$ 4,000
14	Lancaster Scholarship	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
15	Jim Martin Scholarship fund		\$ 1,431	\$ 2,300		\$ 2,300
17	Cassie Murphy-Cullen, PhD Scholarship	\$ 2,400	\$ 2,500	\$ 2,400	\$ 2,700	\$ 2,400
18	Boehm Scholarship	\$ 1,000	\$ -	\$ 1,000		\$ 1,000
19	Mueller Scholarship	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
20	Glen Johnson Minority Scholarship	\$ 1,500	\$ 1,750	\$ 1,500	\$ 1,350	\$ 1,500
21	Roland Goertz Scholarship	\$ 1,152	\$ 2,184	\$ 1,200	\$ 1,200	\$ 1,200
22	Leung Scholarship	\$ 2,300	\$ 2,100	\$ 2,000	\$ 2,050	\$ 2,000
23	Bartos/Pillow Scholarship	\$ 3,900	\$ 2,000	\$ 3,800	\$ 2,000	\$ 3,800
24	Seth Cowan Scholarship	\$ 500	\$ 500	\$ 500		\$ 500
25	Deuser Endowment	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
26	Mettetal Scholarship	\$ 1,300	\$ 1,000	\$ 1,000	\$ 1,200	\$ 1,000
27	Dickey Scholarship	\$ -	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
28	Siy Scholarship	\$ -	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
29						
30	Total Endowed Fund Expenses	\$ 40,266	\$ 43,912	\$ 55,400	\$ 37,565	\$ 55,400

Texas Academy of Family Physicians Foun
Balance Sheet
August 31, 2025

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		YTD FY25	YTD FY24	Net Change
ASSETS				
Current Assets				
10-106-00	Bank of Am Chkg	(\$ 30,952.61)	(14,915.28)	(16,037.33)
10-107-00	Bank of Am Savings	53,628.95	47,280.49	6,348.46
10-104-00	Ishares TR-0-3 MonTres	3,133,760.88	2,991,311.90	142,448.98
10-105-00	Fidelity Govern Cash Res	67,205.97	62,721.26	4,484.71
10-111-00	Vaguard Value Ind Admiral	666,718.02	629,206.38	37,511.64
10-112-00	Vanguard REIT Admiral	394,470.77	406,937.60	(12,466.83)
10-114-00	ALPS ETPs TR Alerian	550,769.04	535,275.13	15,493.91
10-125-00	Accounts Receivable	7,368.30	0.00	7,368.30
10-128-00	Accounts Receivable - Academy	55.00	0.00	55.00
	Total Current Assets	4,843,024.32	4,657,817.48	185,206.84
Property and Equipment				
	Total Property and Equipment	0.00	0.00	0.00
	Total Assets	\$ 4,843,024.32	4,657,817.48	185,206.84
LIABILITIES AND CAPITAL				
Current Liabilities				
20-201-00	Accounts Payable- General	\$ 38,590.40	25,962.25	12,628.15
20-202-00	Accounts Payable - Academy	3,780.00	0.00	3,780.00
20-204-00	Deferred Revenue- Grants	0.00	4,500.00	(4,500.00)
	Total Current Liabilities	42,370.40	30,462.25	11,908.15
	Total Liabilities	42,370.40	30,462.25	11,908.15
Capital				
30-221-00	Fund Balance	1,365,923.23	46,401.83	1,319,521.40
30-222-00	Restricted Principal-Schlrshps	2,053,078.00	2,053,078.00	0.00
30-225-00	Designated Scholarships	802,052.00	802,052.00	0.00
30-228-00	Fund Balance- Interest Schlrsp	406,302.00	406,302.00	0.00
	Net Income	173,298.69	1,319,521.40	(1,146,222.71)
	Total Capital	4,800,653.92	4,627,355.23	173,298.69
	Total Liabilities & Capital	\$ 4,843,024.32	4,657,817.48	185,206.84

TAFP Foundation Gifts to Endowed Funds by Fiscal Year

	FY18	FY19	FY20	FY21	FY22	FY23	FY24	FY25
Kolb Scholarship								
Porres Scholarship	\$ 200	\$ 600	\$ 600	\$ 350				
Pruessner Scholarship	\$ 1,030	\$ 4,378	\$ 3,950	\$ 3,900	\$ 4,250	\$ 6,800	\$ 3,890	\$ 1,330
Ross Scholarship								
Post Scholarship								
S. Texas Schl F TAFP	\$ 87	\$ 180	\$ 60		\$ 50	\$ 100		
Valley Chapter Scholarship								
Mueller Scholarship								\$ 250
Thorek Scholarship								
Powell Scholarship								
C. French Scholarship								
Krause Scholarship	\$ 875	\$ 800	\$ 600	\$ 3,600	\$ 950	\$ 100	\$ 1,083	\$ 300
J.C. Martin Scholarship	\$ 175	\$ 1,420	\$ 385	\$ 140	\$ -			
LR Mabry Scholarship	\$ 2,400	\$ 200						\$ 200
Johnson Scholarship	\$ 60	\$ 50	\$ 200	\$ 120	\$ 3,870	\$ 80	\$ 50	\$ 2,000
Sam Nixon Scholarship								
Murphy-Cullen Scholarship	\$ 2,200	\$ 1,725	\$ 1,600	\$ 1,700	\$ 1,200	\$ 1,950	\$ 400	\$ 500
Lancaster Scholarship								
Hartin Scholarship		\$ 50	\$ 50	\$ 50			\$ 50	
H.Boehm Scholarship	\$ 600	\$ 700	\$ 300	\$ 600	\$ 600	\$ 100		
R. Goertz Scholarship	\$ 300	\$ 720	\$ 720	\$ 970	\$ 1,020	\$ 1,470	\$ 1,995	\$ 2,410
Pillow/Bartos Scholarship		\$ 450	\$ 1,175	\$ 900	\$ 900	\$ 900	\$ 1,733	\$ 705
P. Leung Scholarship								
S. Cowan Scholarship						\$ 10,000		
T. Deuser Endowment	\$ 250						\$ 450	\$ 250
N. Dickey Scholarship	\$ 3,150	\$ 26,140	\$ 240	\$ 240	\$ 490	\$ 100		
Research Endowment	\$ 8,000	\$ 1,053	\$ 720	\$ 660	\$ 600	\$ 600	\$ 5,400	\$ 240
Student Interest Endowment	\$ 5,815	\$ 19,183	\$ 7,165	\$ 6,570	\$ 710	\$ 800	\$ 17,220	\$ 370
T. Mettetal Scholarship		\$ 30,000						
Resident Leadership Endowment						\$ 21,500		
L. Siy scholarship						\$ 27,030	\$ 5,233	\$ 4,550
L. Rochen Scholarship								\$ 9,290
	\$ 25,142	\$ 87,650	\$ 17,765	\$ 19,800	\$ 14,640	\$ 71,530	\$ 37,505	\$ 22,395



Texas Academy of Family Physicians Foundation
 12012 Technology Blvd., Suite 200
 Austin, Texas 78727
 (512) 329-8666 • fax (512) 329-8237

Memorandum

To: TAFP Foundation Board of Trustees

From: Nominating Committee
 Justin Bartos, MD; Ashok Kumar, MD; Rebecca Hart, MD; Lesca Hadley, MD

Date: November. 1, 2025

For the first time, we used a form for potential new trustees to apply to serve. Kathy sent an email to FMLE and RLE alumni to generate interest and we have five members who applied. The Sweglers resigned earlier this year and Dr. Moquist asked that he not be elected to another term.

Below are our recommendations:

Item 1. We recommend re-electing the following trustees to another three-year term on the TAFP Foundation Board of Trustees.

Ashok Kumar, MD; Eric Lee, MD; Jake Margo, MD; Donald Nino, MD, Richard Young, MD

Item 2. We recommend electing the following for a term as At Large Trustees.

Tochukwu Noh, MD	New Physician – 2025 residency completion	Odessa	RLE alumnus
Joshua Splinter, MD	Mid-career – 2015 residency completion	Athens	FMLE alumnus
Jessica Yao, MD	Mid-career – 2012 residency completion	San Antonio	FMLE alumnus, local chapter leader
Lahri Kancharla, MD	Mid-career – 2015 residency completion	Flower Mound	FMLE 2025

Amna Waqar, MD	Mid-career – 2010 residency completion	Houston	FMLE 2025
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- Item 3. We recommend the following slate of officers for 2026:
 President – Linda Siy, MD
 Vice President – Rebecca Hart, MD
 Treasurer – Lloyd Van Winkle, MD

October 31, 2025

Linda Siy, MD

President TAFP Foundation

12012 Technology Boulevard

Suite 200

Austin, TX 78727

Cc: Kathy McCarthy

Dear Dr. Siy

I am writing this letter because I doubt if I will be at the next board meeting for the TAFP Foundation.

I received an email from Kathy McCarthy regarding being renominated to the Foundation Board. It would have been easy to fill out the form and say yes. I then started to think why should I continue to serve on the Board. I am no longer in practice and not completing CME at age 78. This is an opportunity for a younger physician to be involved. This is good for leadership development.

I want to thank the Foundation for letting me be involved. I am a farm boy from North Dakota. I can remember in 1998 when we had to move because of Carol's asthma, I called Jim Martin and Tim Lambert that I was moving to Texas. I informed them I just wanted to serve the TAFP. Sam Nixon, who installed me as the President of the NDAFP, was speechless when I told him about our upcoming move to Texas.

I was fortunate this Board gave me the privilege to be President for 10 years from 2006 thru 2016. With your help and the staff's help our endowment grew from \$1,129,572 to \$2,861,145. We established the Research Endowment

which is at \$182,168. Our annual research grant funding grew from \$20,000 to \$35,000. Look at what we are doing now in research! We started the Tamra Deuser Endowment for supporting palliative care education.

As many of you know I have done numerous presentations at TAFP meetings on various Geriatric topics. My challenge to the TAFP Foundation Board is to establish an endowment to help support Geriatric education presentations at TAFP meetings. Our population is growing older, and FPs take care of older people in the hospital, clinics, nursing homes, and home visits. This is why I feel it is an important endeavor for the Board to support our members.

Thank you for considering this proposal and supporting my involvement in the TAFP.

Sincerely,

A handwritten signature in cursive script, reading "Dale C. Moquist, MD". The signature is written in dark ink and is positioned above the printed name.

Dale C. Moquist, MD



Texas Academy of Family Physicians Foundation
 12012 Technology Blvd, Suite 200
 Austin, Texas 78727
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MEMO

To: TAFP Foundation Board of Trustees

From: Kathy McCarthy, Executive Director

Date: November 1, 2025

Re: Annual Session Activities

We have several opportunities for fundraising and visibility for the work of the Foundation at the 2025 Annual Session and Primary Care Summit.

- We have a fundraising dinner at Chamberlain's Steak and Fish on Friday. We have more than \$17,000 in sponsorship and we still have tickets to sell.
- Dr. Linda Siy will deliver a short Foundation update to the attendees during the CME general session on Friday morning.
- TAFP included a place for Annual Session registrants to make donations when they registered. We've raised over \$1100 from that so far plus \$600 from VIP seating.
- A past research grant recipient, Dr. Namita Bhardwaj is presenting Sunday morning on pre-participation physical examinations. We struggled this year to find presenters for The Abstract and only one of the presenting group includes past grant recipients.
- We'll recognize cumulative donors and scholarship recipients during the Saturday Awards Lunch. We have 10 scholarship recipients planning to attend.

Sage Campbell, MS	Glen Johnson, MD, Minority Medical Student Scholarship
Joshua Carter	Nancy W. Dickey, MD, Medical Student Scholarship
Breanna Chachere, MPH	South Texas Chapter Scholarship and the Glen Johnson, MD, Minority Medical Student Scholarship
Emilia Chapa	Arnold N. Krause, MD, Medical Student Scholarship
Andrew Cottrell, MS	Arnold N. Krause, MD, Medical Student Scholarship and Linda M. Siy, MD Medical Student Scholarship
Joshua Angelo Mihalik, MS	Glen Johnson, MD, Minority Medical Student Scholarship
Emily Mitchell	South Texas Chapter Medical Student Scholarship
Anh Phung	Valley Chapter Medical Student Scholarship

Clara Schneider	Dr. David Pillow Scholarship in Honor of 2001 TAFP President Justin Bartos, MD
Jun Wu	Edwin L. Mueller, MD, Medical Student Scholarship

-



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MEMO

To: TAFP Foundation Board of Trustees

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

Date: November 1, 2025

Re: Research Update

Research is still going strong, but we only had fewer proposals for the fall cycle than we've had the last few. Drs. Lesca Hadley and Richard Young reviewed the proposals and decided to fund all three. Assuming the draft budget is approved, that will leave enough funding for four proposals in the spring.

Final reports from Wei-Chen Lee, PhD, Sally Weaver, MD; and Victoria Udezi, MD, MPH, follow this memo.

Research in progress

Here are the research projects funded and in progress.

Funded in 2025

Knowledge, treatment practices, and preventative strategies for Urinary Tract Infections (UTI) in Spanish-speaking women

Ashley Collazo, MD, MPH, Baylor College of Medicine

Stroke Risk from Menopausal and Contraceptive Hormones in Women 45-64 years of age

Laura Porterfield, MD, MPH, FAAFP, UTMB Galveston

The Association Between Stigmatization Profiles and Chronic Pain in a Family Medicine Patient Population

Chance R. Strenth, PhD, UT Southwestern

Funded 2024

Implementing and assessing the impact of an OB skills workshop on the OB clinical rotation experience for Family Medicine residents

Deepa Somcio, MD, Memorial Family Medicine Residency

Exploring and Improving Type 2 Diabetes Outcomes Using Short-Term Continuous Glucose Monitoring

Chelsea Mendonca, MD, Baylor College of Medicine

Waco COVID survey Follow-up survey

Sally Weaver, PhD, MD, Waco Family Medicine

Building a Sustainable Referral System between Primary Care and the San Antonio Food Bank: Implementation and Evaluation

Yun Shi, MD, PhD, UT Health San Antonio

Texas Two-Step: Evaluation of two-part blood pressure screen during mass pre-participation physical exams in detection of pediatric hypertension

Namita Bhardwaj, MD, MPH, UTMB Galveston

Understanding Clinicians' and Residents' Utilization of Telehealth in Family Medicine: An RRNeT Study

Maria Montanez Villacampa, MD, UT Health San Antonio

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

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

How Family Medicine Physicians Can Demonstrate Accountability: an RRNeT Study

Richard Young, MD, JPS / RRNeT

Funded 2019

Shared Care Model of Obesity Patients' Management

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

**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

New proposals

We received three new proposals. The committee decided to fund all three and researchers are being notified.

Title	Amount requested
Feasibility of Integrating Acupuncture in Primary Care for Medically Underserved Populations <i>Hasan Yasin, MD, UTMB Galveston</i>	\$10,000.00
Understanding Women's Experiences with IUDs: A Qualitative Study in Bexar County <i>Tharani Ravi, MD, UT Health San Antonio</i>	\$9,955.00
Treatment of alcohol use disorders in adults in office-based addiction treatment clinics vs. psychiatric clinics in a county system: medication prescribing behaviors <i>Andrea Nguyen, MD, UT Health McGovern</i>	\$6,402.00

New Pins for 2025 –

Visionary (\$50,000+)

Adrian Billings, MD, PhD

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

Antonio Falcon, MD

Linda M. Siy, MD

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

Jorge Duchicela, MD

Shelley Kohlleppe, MD

Partner (\$6000-\$9999)

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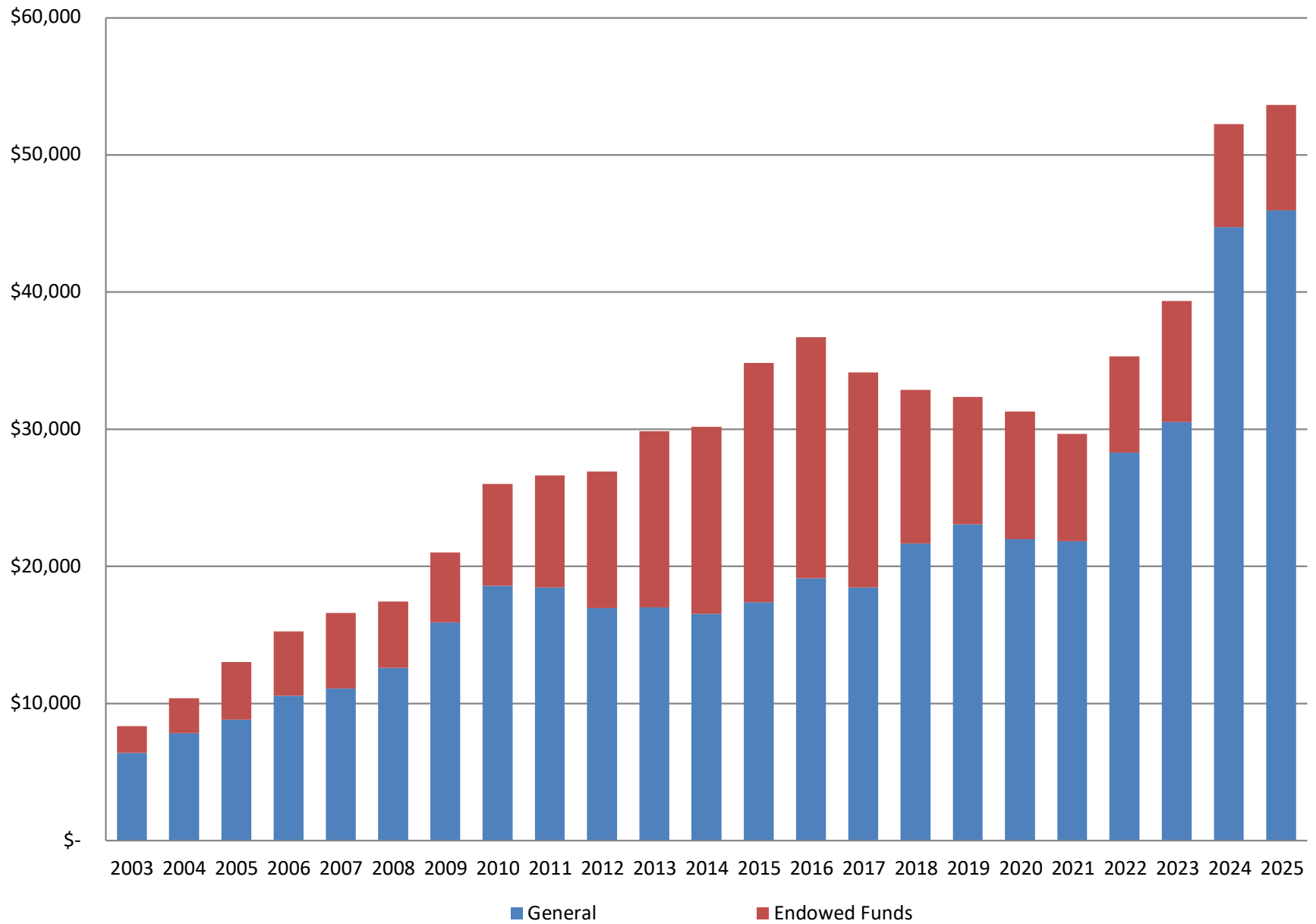
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Jun Wu

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Scholarships & Endowments

	8/31/2024 Balance at audit	FY25 Donations & Transfers	Appreciation	FY25 Payouts & Reductions	8/31/2025 balance at audit	FY26 Payout allowed
Valley Chapter	\$ 268,466	\$ -	\$ 15,777	\$ 3,000	\$ 281,243	\$ 11,250
Student Interest Endowment	\$ 206,011	\$ 370	\$ 12,107	\$ 1,435	\$ 217,053	\$ 8,682
Pruessner	\$ 193,803	\$ 1,330	\$ 11,389		\$ 206,522	\$ 8,261
Research Endowment	\$ 182,168	\$ 240	\$ 10,705	\$ 7,287	\$ 185,826	\$ 7,433
Mabry	\$ 125,496	\$ 200	\$ 7,375	\$ 4,800	\$ 128,271	\$ 5,131
Bartos / Pillow	\$ 109,089	\$ 705	\$ 6,411	\$ 2,000	\$ 114,205	\$ 4,568
Martin	\$ 72,885		\$ 4,283		\$ 77,168	\$ 3,087
Murphy-Cullen	\$ 69,495	\$ 500	\$ 4,084	\$ 2,700	\$ 71,379	\$ 2,855
Ross	\$ 67,783		\$ 3,983	\$ 2,000	\$ 69,766	\$ 2,791
Krause (Tarrant County)	\$ 66,337	\$ 300	\$ 3,898	\$ 2,500	\$ 68,035	\$ 2,721
Resident Leadership Endowment	\$ 64,903		\$ 3,814	\$ 2,596	\$ 66,121	\$ 2,645
Kolb	\$ 60,896		\$ 3,579	\$ 2,430	\$ 62,045	\$ 2,482
Leung	\$ 55,879		\$ 3,284	\$ 2,050	\$ 57,113	\$ 2,285
Goertz	\$ 53,399	\$ 2,410	\$ 3,138	\$ 1,200	\$ 57,747	\$ 2,310
Post	\$ 50,170		\$ 2,948		\$ 53,118	\$ 2,125
Johnson Minority	\$ 46,870	\$ 2,000	\$ 2,754	\$ 1,350	\$ 50,274	\$ 2,011
Nixon	\$ 46,278		\$ 2,720	\$ 1,200	\$ 47,798	\$ 1,912
Porres	\$ 45,240		\$ 2,659	\$ 1,800	\$ 46,099	\$ 1,844
Lancaster	\$ 45,164		\$ 2,654	\$ 1,000	\$ 46,818	\$ 1,873
Boehm	\$ 45,962		\$ 2,701		\$ 48,663	\$ 1,947
South Texas Chapter	\$ 42,801		\$ 2,515	\$ 950	\$ 44,366	\$ 1,775
Hartin	\$ 42,436		\$ 2,494	\$ 1,099	\$ 43,831	\$ 1,753
Cowan	\$ 42,131		\$ 2,476		\$ 44,607	\$ 1,784
Dickey	\$ 39,801		\$ 2,339	\$ 1,000	\$ 41,140	\$ 1,646
Thorek	\$ 38,263		\$ 2,249	\$ 937	\$ 39,575	\$ 1,583
Mettetal	\$ 34,101		\$ 2,004	\$ 1,200	\$ 34,905	\$ 1,396
Mueller	\$ 30,365	\$ 250	\$ 1,784	\$ 1,000	\$ 31,399	\$ 1,256
French	\$ 30,198		\$ 1,775	\$ 1,350	\$ 30,623	\$ 1,225
Deuser	\$ 29,444	\$ 250	\$ 1,730	\$ 1,000	\$ 30,424	\$ 1,217
Siy	\$ 33,778	\$ 4,550	\$ 1,985	\$ 1,000	\$ 39,313	\$ 1,573
Powell	\$ 11,479	\$ -	\$ 675		\$ 12,154	
Rochen	\$ -	\$ 9,290	\$ -	\$ -	\$ 9,290	
TAFP Endowment	\$ 1,000,000		\$ 58,767	\$ 40,000	\$ 1,018,767	\$ 40,751
Totals	\$ 2,251,091	\$ 13,105	\$ 132,289	\$ 48,884	\$ 2,347,601	\$ 93,904