



# **LOOKBACK REPORT**

## **2023 – 2025**

### **TRANSITION YEARS**

# LETTER FROM DR. BURGER

Dear Central Texas Community,

This year marks an important milestone for St. David's Foundation — 2026 represents 30 years of grantmaking in our region. For three decades, we have had the privilege of investing in organizations, programs, and people working every day to improve health and well-being across Central Texas.

This three-year Lookback Report reflects the external work of the entire Foundation from 2023 through 2025, which includes our grantmaking, the St. David's Foundation Dental Program, and the St. David's Neal Kocurek Scholarship Program. The period covered in this report spans a pivotal time of growth and evolution for our organization. It reflects a transition from our 2020–2022 grantmaking plan into our new organization-wide strategic plan, [Pathways to Health Equity](#). This shift represents more than a new framework — it marks an important alignment of the programs we operate and our grantmaking investments toward shared, Foundation-wide goals.

This transition unfolded during a time of significant disruption in the world around us. Communities across Central Texas have been navigating economic uncertainty, significant public policy shifts, and a growing strain on essential systems that many families rely on daily. These broader forces shape the context in which our partners work and in how families seek care, education, and stability. These disruptions also underscore the urgency and importance of our mission.

A significant evolution in our strategy was acknowledging that if we are to realize lasting improvements in health across our region, we must address not only the immediate needs of *today*, but also the systems and conditions that shape the opportunity to be healthy *tomorrow*— that is, generational change. Access to care matters deeply. So do economic stability, education, housing, and the broader environments in which people live and work.

As we made this profound transition, we recognize change — especially amid external uncertainty — can be disruptive; particularly for those who walk alongside us in this work. We approached this period with intentionality, seeking to actively listen and minimize disruption as best we could while strengthening alignment with our mission: To advance health equity through investment and action.

The data shared in this report paints a panoramic picture and serves a fundamental purpose: As a tool for learning and reflection. This report helps us process and thus better understand what is working, where we can improve, and how we can enhance our impact. It also allows the communities we serve to better understand our investments as well as the progress made.

Our impact has always depended on collaboration. To the partners who have been part of our journey — whether for decades or just briefly — *thank you*. We cannot advance our mission without you. It is your expertise, trust, and commitment to Central Texas that make all this work a reality.

We remain committed to learning, evolving, and standing alongside our community as we work toward a healthier, more equitable Central Texas.

With appreciation,  
Edward Burger, Ph.D.  
President & CEO

# 2023-2025 IMPACT



**16,533**

Patients Served

## Dental Program

Provided dental care to over 5,000 patients each year, totaling over 16,500 patients and \$30 million in care provided to the community between 2023 and 2025. The program enhanced its effectiveness while maintaining a focus on prevention and evolving its model to add four new partnerships with school districts in communities with the greatest health needs.



**207**

Scholars  
Graduated

## Neal Kocurek Scholarship Program

Funded more than \$6 million over the past three years to over 300 scholars. Over 200 scholars graduated, and the program continues to be the largest healthcare scholarship program in Texas. Beyond the scholarships, the program offers a host of essential wraparound services to support our students (including mentorship and tutoring).



**\$289M**

Granted

## Grantmaking

Granted \$288.9 million to Central Texas nonprofits, accounting for one-fourth of the Foundation's total grantmaking since 1996. Focused on stabilization and equity, the Foundation maintained momentum for projects funded under the prior grantmaking plan (2020–2022) while leaning into more equitable and innovative grantmaking practices as the initial investments under the *Pathways to Health Equity* plan were made. Transition funds helped grantees continue to serve Central Texans at the same scale and contributed to:

- 40,000 individuals receiving dental services
- 28,000 individuals receiving mental health services
- 144,000 receiving other medical services
- 17,000 individuals receiving training on best practices in care provision

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# INTRODUCTION

**St. David's Foundation** is committed to measuring outcomes and striving for work that drives meaningful, lasting impact.

This report shares data on the Foundation's impact from 2023–2025 — a period of significant transformation in both our strategy and our ways of working. It reflects the time during which we developed and began implementing *Pathways to Health Equity* (2024–2030), our first organization-wide strategic plan. This plan represents an important evolution in our understanding of health — expanding from a primary focus on healthcare service delivery to a broader mission to advance health equity that includes the systems and conditions that shape health outcomes.

As this transition began, our previous grantmaking plan (2020–2022) continued to guide funding decisions in 2023. The impact of that plan is detailed in a grantmaking progress report available [here](#).

We recognize the impact of the Foundation's transition on our community partners. Throughout this period, we worked intentionally to minimize disruption, communicate transparently, and strengthen trust as we aligned our work toward a new strategic direction — one that more deeply engages communities with the greatest health needs.

We view data as an essential instrument for learning and collaboration. By sharing our progress, we seek to listen more closely, refine our approach, and continue evolving our work alongside our partners.

## Community Impact Teams

The Foundation's impact is driven by the programs we operate — the St. David's Foundation Dental Program and the St. David's Neal Kocurek Scholarship Program — and our investments through grantmaking. In addition, the work of the Learning & Evaluation and Communications teams in advancing the Foundation's goals are also reflected in this report.



### Grantmaking

Investing more than \$100M annually to support community health and well-being.



### Mobile Dental Program

Providing highly accessible, evidence based oral care for disadvantaged children in Central Texas.



### Scholarship Program

Easing the financial burden for students pursuing health studies and supporting student success.



### Learning & Evaluation

Using data and research to bring diverse stakeholders into a shared conversation to realize deeper insights.



### Communications

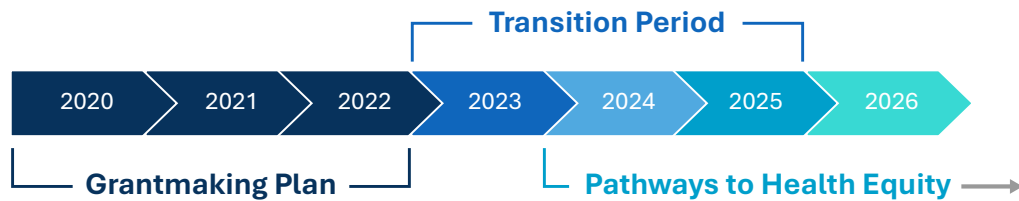
Sharing what we are learning to create a community-wide understanding for health equity.

# An Overview of the Transition

2023

In September of 2022, the Foundation Board of Trustees approved a new [Strategic Vision and Direction](#) for the Foundation centered on health equity, which paved the way for a new Foundation-wide strategic plan.

In 2023, St. David’s Foundation extended its 2020-2022 grantmaking plan for an additional year to maintain the momentum of ongoing grantee work in the community while the Foundation began its strategic planning process. That year provided time to [reflect on the then-current body of work](#), learn from the progress made, and continue the planning process for a plan that would guide the Foundation through 2030.



2024

In early 2024, St. David’s Foundation introduced its first organization-wide strategic plan, [Pathways to Health Equity](#), that included grantmaking, programs, and operations. The plan is centered on three strategic external goals (together with organizational excellence as an internal goal), shifting away from a previous grantmaking framework that focused on five areas. During this shift, current grants were extended through the end of 2025, following philanthropic best practices to minimize destabilization resulting from changes in the Foundation’s funding strategy.

2025

Over 2024 and 2025, the Foundation evolved its work to align with its new strategic plan. This effort included deepening our focus on communities with the greatest health needs and evolving our practices and processes to be more effective and impactful. For grantmaking, the Foundation launched its first grants under the new strategic plan through an open call process rather than the traditional invitation-only process.

The focus on minimizing grantee destabilization continued into 2025 with a third phase of transition grants as shifts in federal policy caused widespread fear and instability in organizations and communities across the country.

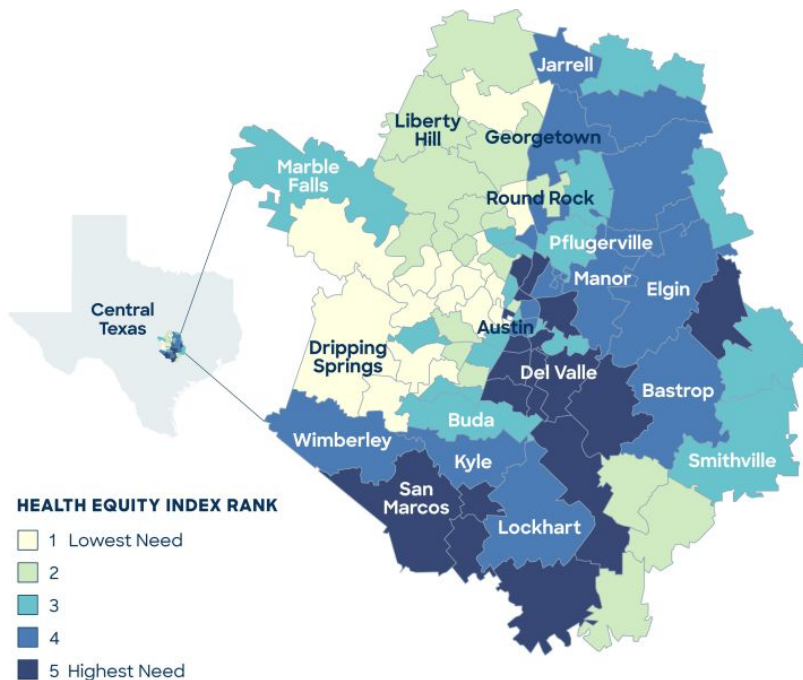
# 2023-2025 IMPACT AND EVOLUTION

## Goals During the Transition Period

The impact of the Foundation’s programs and grantmaking during the 2023-2025 transition period is reported based on three overarching goals set for this period of transition:

1. Maintain the momentum of our impact in the community
2. Deepen our focus on **communities with the greatest health needs in Central Texas**
3. Evolve our practices and processes to improve effectiveness

### Where are the communities with the greatest health needs?



The [Health Equity Zones](#) map is a new tool developed by the Foundation to identify and understand the *communities with the greatest health needs in Central Texas*.

Using a Health Equity Index score, the tool summarizes seven socio-economic factors with the strongest statistical correlation to key health outcomes, including income, employment, healthcare access, education, and historical marginalization (race, ethnicity, and immigration status).

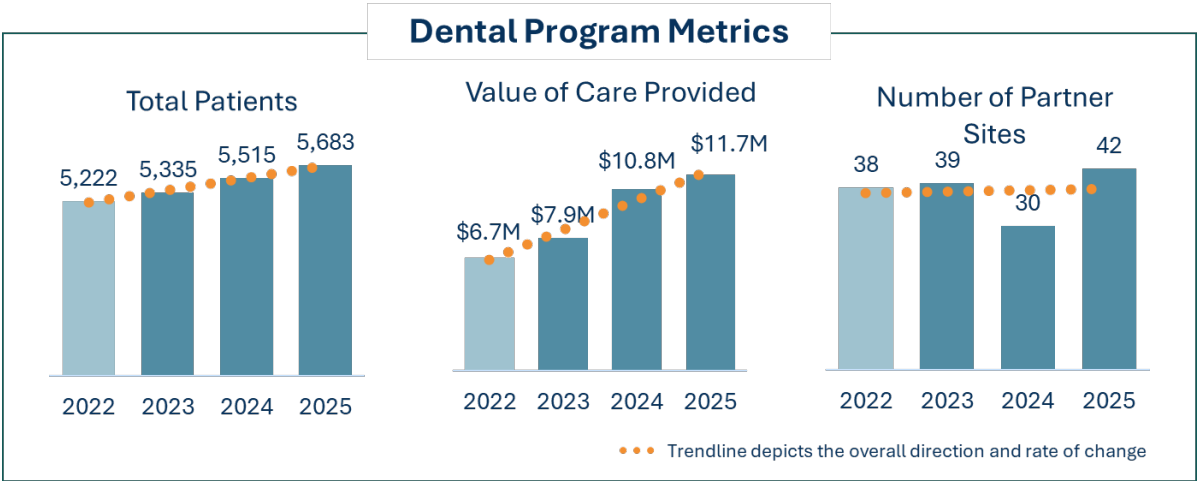
The map shows a score for each Central Texas zip code, with the lightest color representing the healthiest communities and the darkest representing those **with the greatest health needs**.

# St. David’s Foundation Dental Program

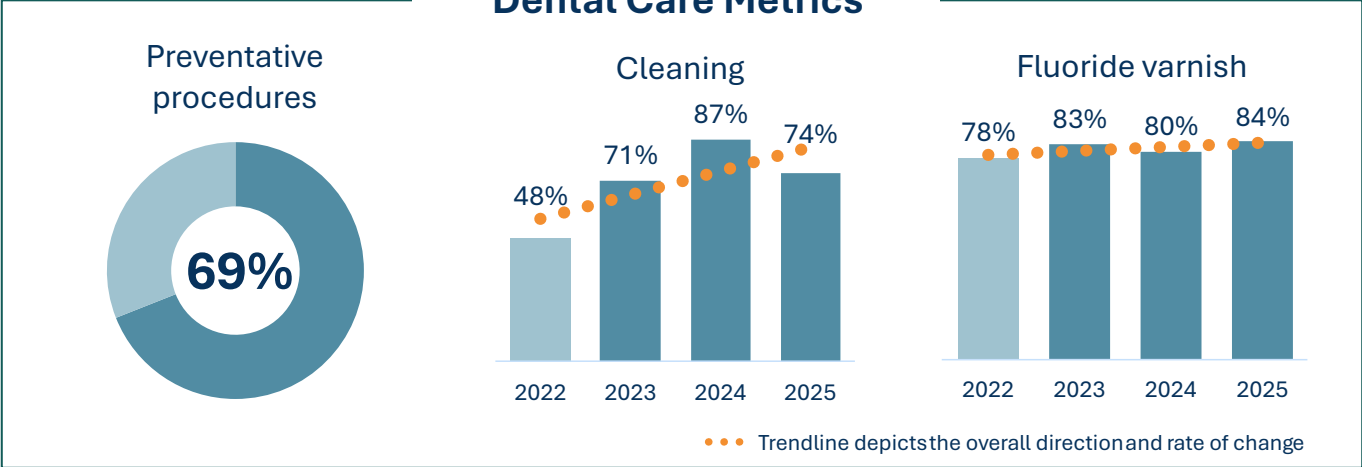
The Dental Program provided dental care to over 5,000 patients each year, totaling over 16,500 patients and \$30 million in care provided to the community between 2023 and 2025. The program enhanced its effectiveness while maintaining a focus on prevention and evolving its program model to add four new partnerships with school districts in communities with the greatest health needs.

## Provide Highly Accessible, Evidence-Based Dental Care

In 2025, 5,683 patients received free dental care through the Dental Program, an increase of 461 patients over 2022 (a 9% increase). The value of care provided to the community increased 75%; however, this increase is amplified by recent changes in our fee schedule benchmarking that more accurately reflect the current cost for services in Central Texas. In 2024, the program served larger schools, with more time spent at each, leading to a temporary decrease in the number of partner sites while continuing to increase the number of patients served.



The Dental Program prioritizes preventive care to support the long-term oral health of the children served while also providing restorative treatment when needed. The annual percentage of preventive care provided, versus restorative care, remained consistent at 69-70% of procedures since 2022. The most common preventive procedures provided were cleanings, which increased from roughly half of patients to nearly three-quarters, and fluoride varnish, which was given to 80-84% of patients between 2023 and 2025.

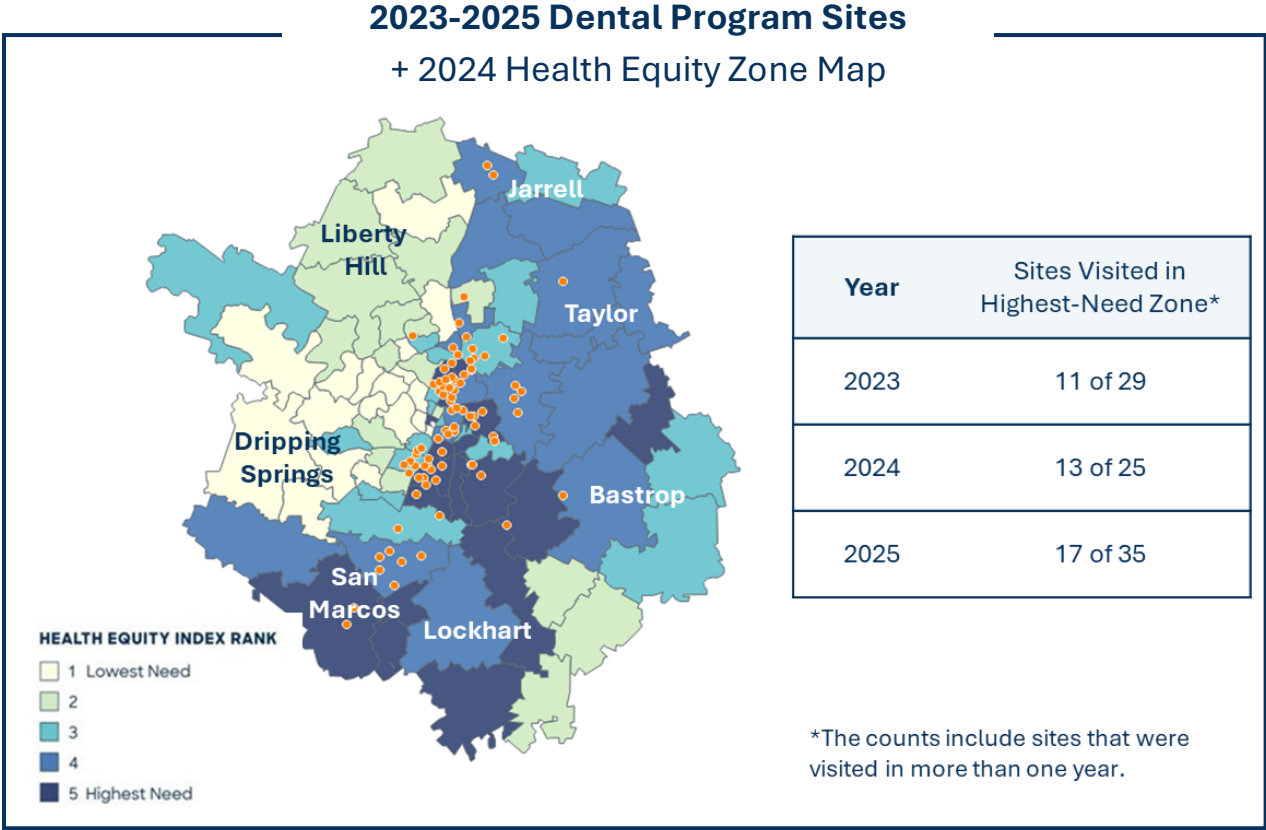


# Deepen Focus on Communities with the Greatest Health Needs

Through more precise data collection and enhanced site-selection methods, the Dental Program increased the proportion of patients served from communities with the greatest health needs — a core priority of the new strategic plan.

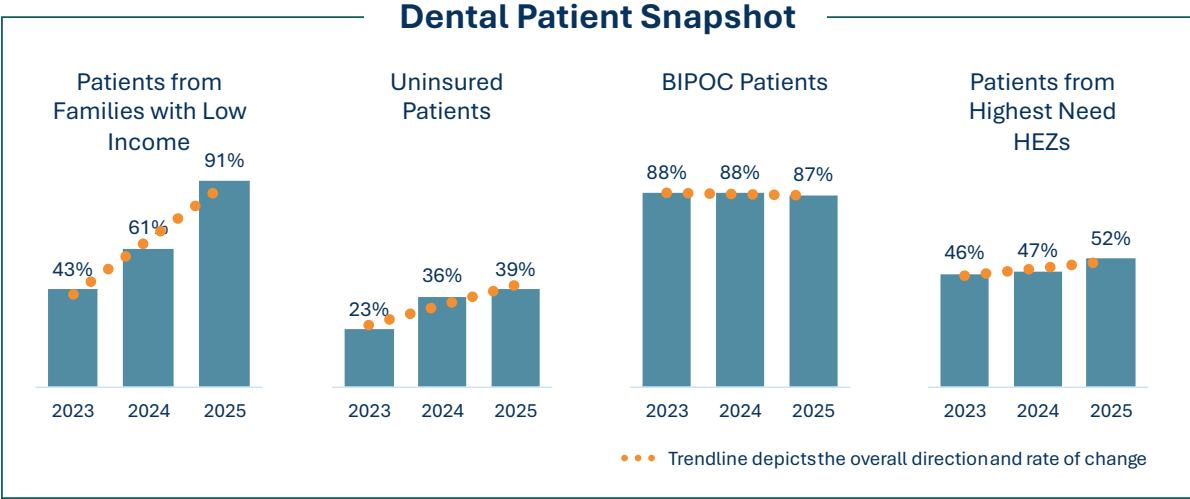
A key operational improvement was the implementation of electronic consent forms, which significantly strengthened the program’s ability to understand patient demographics and needs. As a result, the percentage of patients with unknown income or insurance status decreased dramatically — from 31% in 2023 to just 1% in 2025.

These shifts in patient demographics reflect intentional expansion into new partnerships with rural school districts and community-based sites, including Jarrell ISD, the Boys & Girls Club in Taylor, Bastrop ISD, and San Marcos ISD. Over the course of 2023 to 2025, the Dental Program served 86 sites, 37 of which were in areas with the greatest health needs. The proportion of sites in these priority communities increased from 38% in 2023 to 49% in 2025.



With improved data collection, the Dental Program can monitor progress on reaching patients from communities with the greatest health needs, who could most benefit from access to the free dental care provided by the program.

The data below shows the effects of site selection changes and improved data collection methods. Between 2023 and 2025, the proportion of low-income patients doubled, growing from 43% of patients served in 2023 to 91% in 2025. The proportion of uninsured patients also increased from 23% to 39% since 2023. The proportion of patients who are Black, Indigenous, and People of Color (BIPOC) remained above 85% for the third year in a row. Finally, the proportion of patients from the highest-need Health Equity Zones (HEZs) grew to almost 3,000 individuals, or to slightly over half of the 5,600+ patients served in 2025.



## Evolve Practices and Processes to Increase Effectiveness

### Clinic on Wheels Tour

In the Fall of 2025, the Dental Program piloted a new outreach strategy at service sites, the *Clinic on Wheels Tour*. The pilot program sought to improve care delivery outcomes by providing key stakeholders with an opportunity to visit the mobile clinics prior to the start of services to learn about the Dental Program, the patient experience, and benefits.

The *Clinic on Wheels Tour* was piloted at Blake Manor Elementary School, where all students, kindergarten through fifth grade, participated in guided tours of the mobile dental clinics. Additionally, teachers received an on-site presentation from Dental Program staff that outlined services and addressed questions.

The pilot was successful and led to the following outcomes:

- Student awareness of our dental services was **8x higher than average**, which contributed to reduced dental anxiety and improved cooperation during treatment.
- The number of consent forms returned was higher at the *Clinic on Wheels* site, with a noticeable spike in consent form returns after the event (**double the average return rate** during the first week of care).
- **Decreased resistance** from teachers when students need to be excused from the classroom for appointments, allowing patient care to start earlier.

Looking forward, we know that fostering stronger community connections will help us to reach those students with the greatest health needs and reduce barriers to care.

The implementation of the *Clinic on Wheels Tour* was informed by community input gathered through the [Parent Support Specialists \(PSS\) Advisory Committee](#), composed of 15 Parent Support Specialists from the Austin Independent School District. The Foundation convened this committee to utilize community expertise to help us become more impactful.

PSS Advisory Committee members emphasized the importance of building relationships with the families and students served by the Dental Program and working closely with school administrators, staff, and students. In response, the Foundation opened its mobile clinics to create a welcoming, engaging learning environment. The *Clinic on Wheels Tour* reflects how community input led to meaningful, tangible program improvements.

# St. David’s Neal Kocurek Scholarship Program

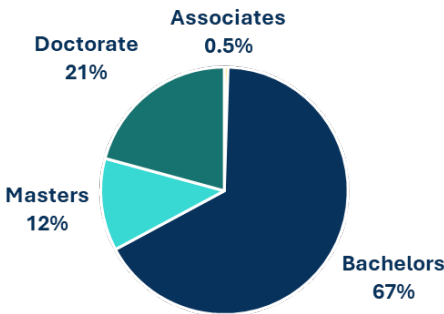
The St. David’s Neal Kocurek (SDNK) Scholarship is the largest healthcare scholarship program in Texas, awarding more than \$6 million over the last three years to over 300 scholars.

## Easing the Financial Burden for Students Pursuing Degrees in Healthcare

Each Spring, the Scholarship Program awards approximately 45 new scholarships to high school seniors beginning their journey towards a healthcare career, supporting these individuals’ economic stability and enhancing the community’s pipeline of high-quality healthcare professionals.

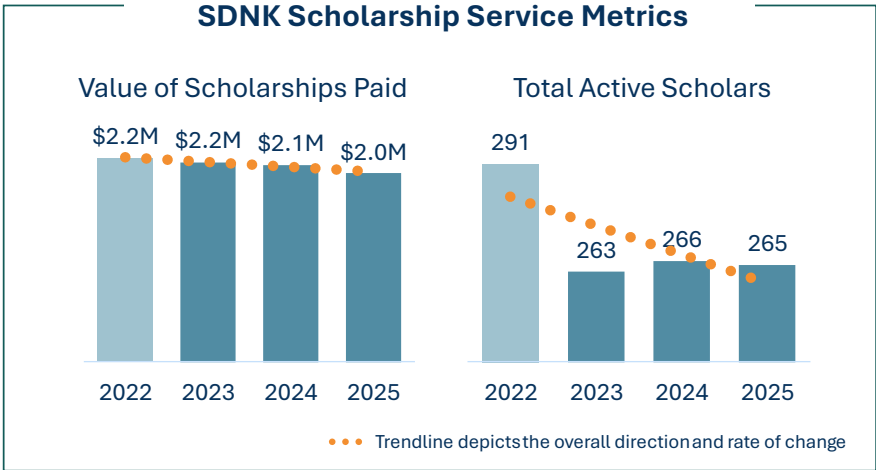
Over the past three years, 207 students from the program earned a degree. Of these, 33 (21%) earned a doctorate degree; 25 (12%) were awarded a master’s degree; 138 (67%) received a bachelor’s degree; and one earned an associate’s degree.

2023-2025 Graduates by Level of Education



In 2025, the program distributed \$2.04 million in scholarships to 265 scholars. The number of active scholars and the cumulative value of student support were relatively stable over the past three years.

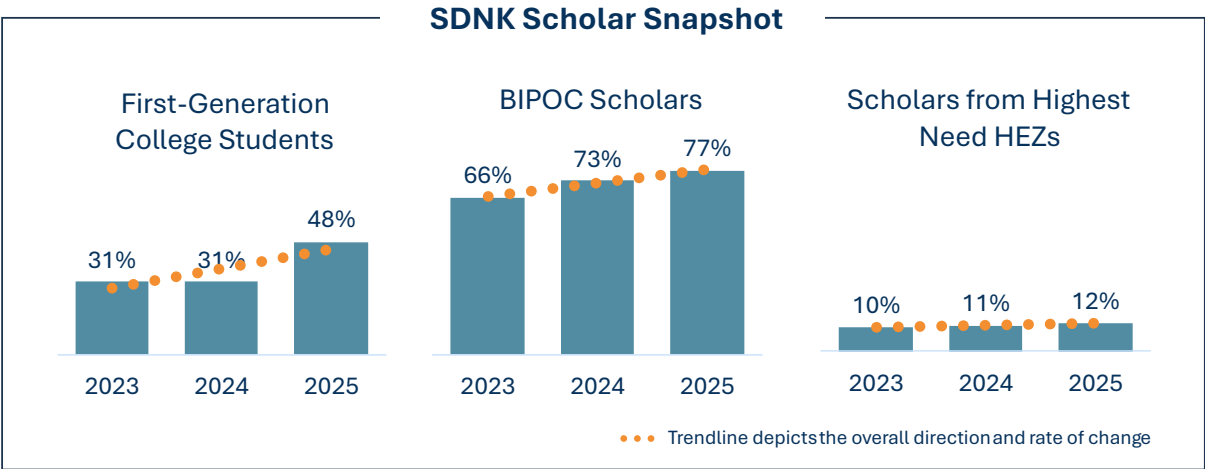
The decrease in active scholars between 2022 and 2023 is a result of the program adjusting the number of scholarships awarded each year to 45 (down from over 60 in 2019) based on the program’s capacity to provide high-quality, wrap-around supports, including mentorship, tutoring, and access to counseling.



# Deepen Focus on Communities with the Greatest Health Needs

Through targeted outreach strategies and improved data collection, the Scholarship Program increased the number of scholarship recipients from communities with the greatest health needs over the past three years.

As a result, the profile of active scholars has become more diverse, with approximately 48% of scholars being first-generation college students, a significant increase from 31% in 2023. Furthermore, the percentage of active scholars who identify as people of color has grown from 66% in 2022 to 77% in 2025, while the percentage of scholars from the highest-need [Health Equity Zones](#) (HEZs) has remained steady. The program is actively working to diversify outreach strategies to attract more applicants from those zones and from more rural areas of Central Texas.



## Evolve Practices and Processes to Improve Effectiveness

### Piloting a 529 Savings Account for More Equitable Fund Distribution

Scholarship displacement occurs when an external scholarship, such as the SDNK Scholarship, reduces other forms of student financial aid—including grants, loans, federal work-study, or other scholarships. Institutions may trigger displacement by deeming a student “over-awarded” should their total aid exceed the school’s self-designated cost of attendance, which often does not include all student-related expenses. To address aid displacement, the SDNK Scholarship Program [piloted the use of 529 savings accounts](#) to distribute scholarship funds to a group of sixteen scholars in the Spring 2025 semester. The 529 pilot sought to provide a more flexible approach to supporting scholars’ financial well-being, often a barrier to graduation.

The pilot was successful and led to the following outcomes:

- Payment delivery was accelerated and reissuance reduced, enabling students to receive payments within 1–3 business days. Of the 16 participants using 529 plans, two students requested reissuance of checks. Normally, such a request would cause a significant delay, but with the 529 process, checks were reissued immediately.
- The pilot prioritized students most affected by aid displacement, those who had never previously received funding, or who relied on annual rollovers. By leveraging 529 accounts, the SDNK Scholarship Program unlocked an estimated \$60,000 that would have otherwise remained inaccessible to some of our most vulnerable students.
- Pilot participants reported overwhelmingly high satisfaction with the ease of 529 processes compared to traditional funding methods. Students expressed sincere appreciation for the expanded capabilities, which allowed educational funds to address a wider range of academic-related needs.

Given the success of the 529 savings accounts, in Fall 2025, the 529 savings account disbursement pilot expanded to 89 scholars. The team is working towards the goal of all scholars receiving funds via a 529 savings account by the Fall of 2026.

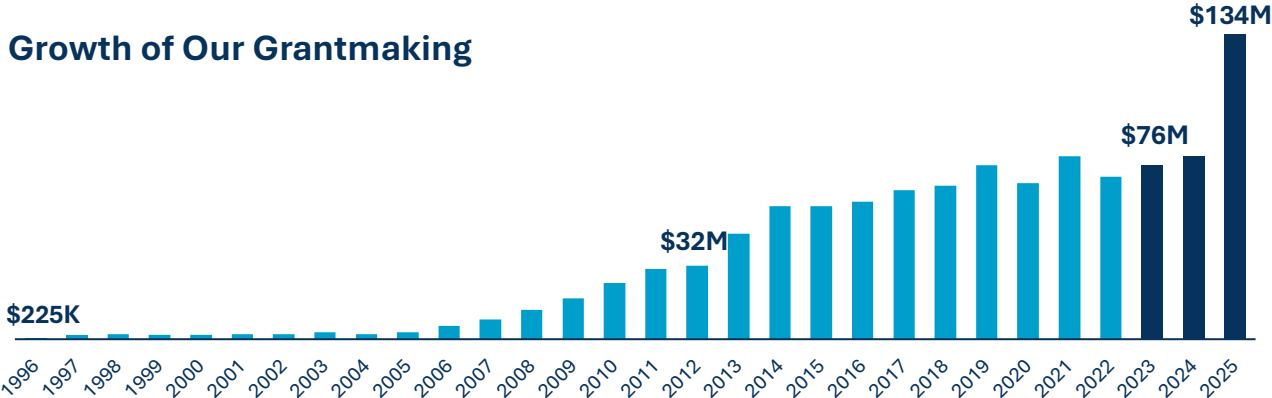
# Grantmaking

Between 2023 and 2025, the Foundation granted over \$288 million to Central Texas nonprofits, accounting for one-fourth of the Foundation’s total grantmaking since 1996. Focused on stabilization and equity, the Foundation maintained momentum for projects funded under the prior grantmaking plan while leaning into more equitable and innovative practices as the initial investments under the new plan were made.

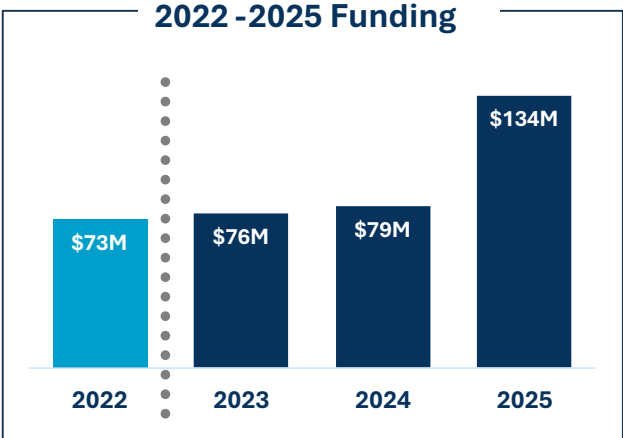
## Overview

Since 1996, there has been enormous growth in the Foundation’s annual grantmaking. The 2023-2025 transition period accounts for 26% of the Foundation’s total grantmaking since 1996, a total that now exceeds \$1 billion.

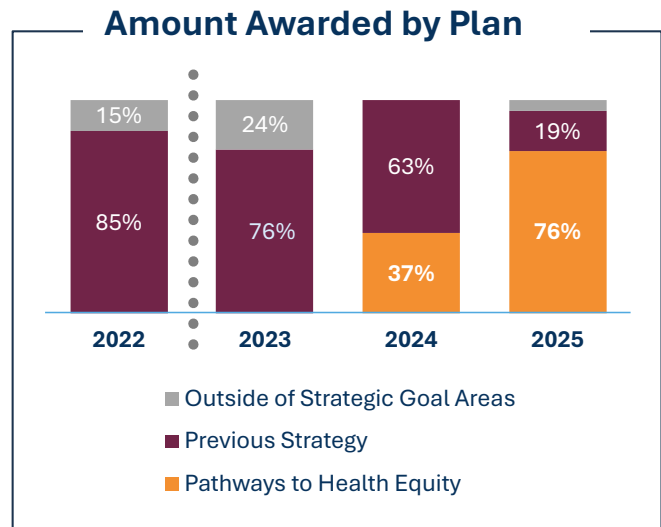
### Growth of Our Grantmaking



During the 2023-2025 transition period, \$288.92 million was invested through 441 grants to 195 organizations. The total amount awarded each year grew significantly between 2024 and 2025. In 2025, \$133.69 million was awarded through 135 grants. This represents an 84% increase in grants awarded compared to 2022.



In order to maintain momentum and reduce instability as the Foundation shifted strategies, over half (55%) of all funding between 2023 and 2025 supported organizations previously funded through the earlier grantmaking plan. The remaining 45% of funding (\$131million) was in support of the three external goals of the Foundation’s new strategic plan.



## Minimizing Destabilization for Grantees

During the 2023-2025 transition period, \$134 million was granted (through 174 transition grants) to 114 organizations funded under the 2020–2022 grantmaking plan. More than half of the grantees active in 2022 (57%) received at least one transition grant to minimize destabilization and provide additional time to explore potential opportunities for funding under the Foundation’s new strategic plan.

As of the end of 2025, nearly half of transition grantees (53 of 114) had received a grant under the Foundation’s new strategic plan.

Despite extended Foundation funding during the transition, it has been challenging for transition grantees to replace lost funding due to widespread cuts to public funding for social services in 2025.

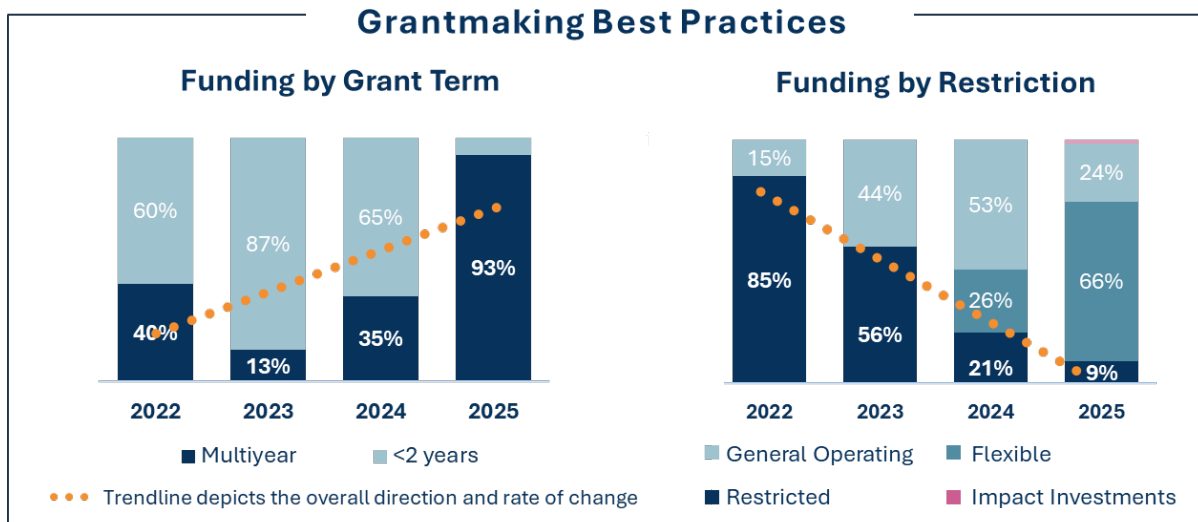
*85% of transition funding focused on advancing the 2020-2022 Grantmaking Plan’s five goals: Aging in Place, Resilient Children, Healthy Women & Girls, Thriving Rural Communities, and Clinics as Hubs for Health. The remaining 15% supported grants for critical infrastructure (e.g. housing, women’s shelters, and capacity building).*

## Applying Grantmaking Best Practices

Providing unrestricted and general operating support is recognized as a best practice in [trust-based philanthropy](#) and has been proven to be a highly effective tool in supporting organizations’ ability to adapt programs, sustain operations, and build capacity.<sup>1</sup>

Throughout the transition period, the Foundation was committed to upholding these principles with integrity, prioritizing flexibility so partners could respond to evolving community needs.

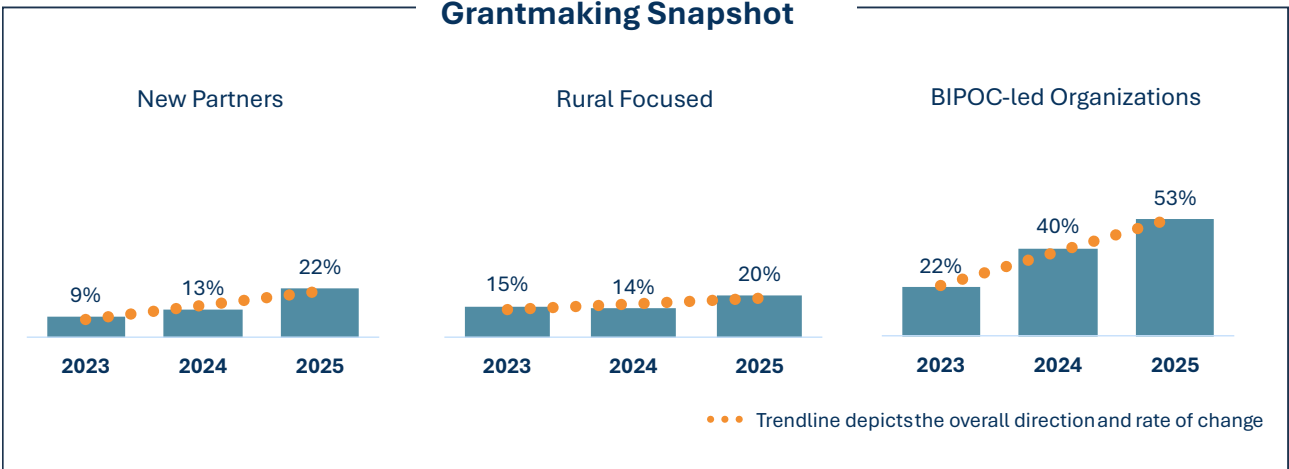
As part of this commitment, multi-year funding increased significantly — from 40% in 2022 to 93% in 2025. Also, restricted funding decreased from 85% in 2022 to less than 10% in 2025. This decrease in restricted funding reflects growth in general operating support and flexible funding. General operating support grants, grants that can be used for any purpose in alignment with the organization’s mission, increased from 15% of funding in 2022 to 53% in 2024. Flexible funding grants, grants that can be used at the grantee’s discretion as the grantee carries out the work outlined in their grant proposal, were introduced in 2024 and comprised 66% of funding in 2025.



<sup>1</sup> Ellie Buteau et al., *New Attitudes, Old Practices: The Provision of Multiyear General Operating Support* (Cambridge, MA: Center for Effective Philanthropy, October 2020), <https://cep.org/report/new-attitudes-old-practices>

# Deepen Focus on Communities with the Greatest Health Needs

The Foundation has committed to continuously improving grant practices to center those communities most impacted by health inequities, including partnering with new organizations, organizations serving rural counties (e.g., Bastrop, Hays, and Caldwell), and BIPOC-led organizations (those whose Board of Directors and Executive staff are majority BIPOC). Over the past three years, the cohort of funded organizations has become increasingly diverse based on these three metrics.



The Foundation evolved its grantmaking processes to align with the 2024–2030 strategic plan by creating more equitable opportunities for organizations to be considered for funding. The growth in new partners, starting in 2024, was driven by the initial funding opportunities of the new strategic plan. There has been a slight uptick in the number of organizations funded that primarily serve Bastrop, Caldwell, or Hays counties — 34 out of 195 total (just under 20%); and over half of the organizations funded in 2025 were BIPOC-led.

# Impact of Transition Grants on Central Texas

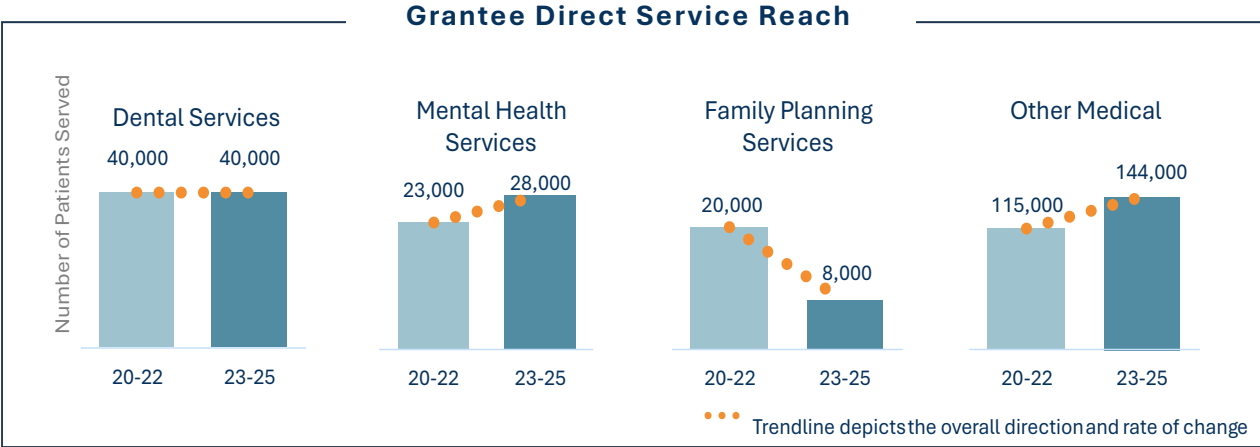
To better understand the impact of transition funding on Central Texas, the Foundation analyzed grantee reports from 2023 through 2025 and compared them to the level of impact realized in 2022. This analysis explores the extent to which services were maintained but does not explore how or under what conditions these outcomes were achieved.

For grants awarded under the 2024-2030 *Pathways to Health Equity* strategic plan, findings from in-depth evaluations on impact and actionable insights can be found in the [2025 Annual Databook](#).

## Maintained access to vital clinical services during the transition period

Approximately 71% of funding from 2023 to 2025 was invested in projects or organizations that provide direct health and social services to Central Texas residents. These investments maintained services for uninsured and underinsured individuals and avoided a steep decline in services during the Foundation’s transition to its new strategic plan.

Across clinical work funded, all maintained or increased services with the exception of family planning. This decrease is a result of changes in reporting and the reported values from one grantee that now provides contraception to community partners rather than providing services directly to patients.



## *Maintained access to evidence-based models to address non-medical drivers of health*

In addition, transition funding helped to maintain the gains of evidence-based models for preventive services through the transition years, and these programs have received extended funding through 2027:

- Three Home Visiting programs in the area served 384 families in 2025, up from 149 families in 2022.
- Two sites, Meals on Wheels and the Area Agency on Aging, continued to implement the CAPABLE Initiative through 2025. The program was launched in 2022, with 73 older adults completing the 5-month program in its first year. In each year from 2023-2025, the program served an average of 92 older adults.
- Since 2022, the Foundation has invested \$2 million in a partnership with Episcopal Health Foundation to support the [Texas Accountable Communities for Health Initiative](#) (TACHI), a statewide project that aims to improve population health and advance health equity by bringing together local stakeholders to develop community-specific solutions. Texas currently has six sites, three of which are supported by the Foundation, including Bastrop County Cares, which, through TACHI, has secured \$970,000 in state funding to support economic stability for new mothers, and Community Health Connect in Williamson County, which connected over 150 expecting or new moms with needed social services and reported significant positive birthing outcomes for participants.<sup>2</sup>

## *Maintained access to training and technical assistance for best practices*

Training and technical assistance to support best practices for practitioners and clinics continued across the region, with over 17,000 individuals receiving training between 2023 and 2025 through programs receiving transition funding:<sup>3</sup>

- Over 13,000 individuals trained in Trauma-informed Care, with 70% of those trained in 2025.
- More than 3,400 individuals trained as caregivers.

Beyond the impact of transition grants, the Foundation's early investments in the 2024-2030 *Pathways to Health Equity* strategic plan contributed to additional impacts in health insurance enrollment, housing, and community-driven change. To learn more about early impacts of these investments, see the [Annual Databook](#).

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<sup>2</sup> United Way for Greater Austin. Pathways Community HUB Williamson County: 2023-2024 Report (June 2023–December 2024). United Way for Greater Austin.

<sup>3</sup> Reporting on training services declined from 8 to 2 programs, while the number of individuals receiving training from grantee organizations was almost 10 times higher in 2025 than in 2022.

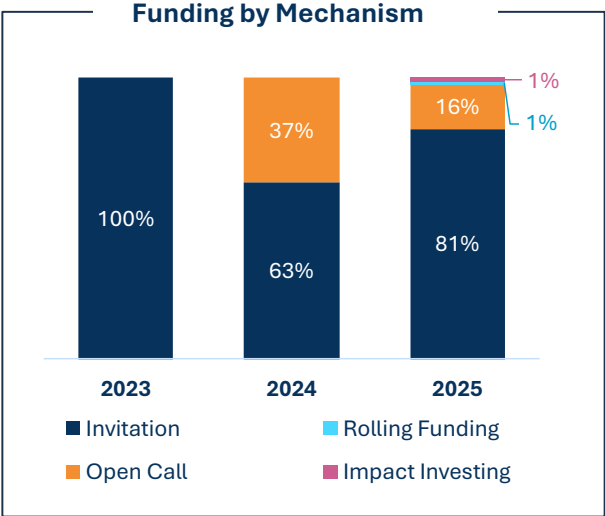
# Evolve Practices and Processes to Improve Effectiveness

The initial grants made in support of the three external goals of the 2024-2030 *Pathways to Health Equity* strategic plan used an open call grantmaking process, designed to surface new partners, work, ideas, future initiatives, and to create a more equitable grantmaking process. The vast majority of prior grants had been awarded through an invitation only process with a smaller portion of funds awarded through a request for proposal (RFP) process that was introduced in 2017.

An open call is a grantmaking or funding mechanism with an open, unsolicited application process, in which organizations (including existing grantees) can submit an application to be considered for funding to advance a priority area or initiative defined by the Foundation. Open calls are announced publicly, and awardees receive funding for a defined period (e.g., a two-year grant) during which they may also participate in cohort-based learning.

In 2024, the Foundation launched four open calls, investing \$29.5 million across 65 grants and representing 37% of total funding for the year. In 2025, the Foundation awarded an additional \$21.7 million through three open calls, supporting 54 grants and accounting for 16% of total funding that year.

By implementing open calls, the Foundation successfully reached new organizations and new bodies of community work. Across the four open calls in 2024, almost half of the groups that submitted a Letter of Intent had never received a Foundation grant. Of the open call grant recipients, 23%, had never been funded by the Foundation.



Findings from the Center for Effective Philanthropy’s [Declination Survey](#) in the Spring of 2025 found that most declined applicants agreed that the process helped advance the Foundation’s mission and the shift to open calls increased accessibility. However, many declined applicants also described a misalignment between the stated purpose of increasing access to Foundation funding and their perception that larger, more established organizations still ultimately received funds.

Reflecting on these findings and in alignment with the *Pathways to Health Equity* strategic plan, the Foundation significantly adjusted its efforts in 2025. The percentage of grants awarded through open calls to organizations that had not previously received a grant increased from 23% in 2024 to 44% in 2025. In addition, the grantmaking team established new ways to engage community members when sharing the focus of funding opportunities. Over the course of the year, the grantmaking team engaged over 100 individuals through advisory committees, informant interviews, and convenings. These engagements varied in format by funding opportunity but were a key step in refining each open call launched in 2025 based on the needs expressed by community members and community-based organizations.

"In addition to open calls, the Foundation tested new funding mechanisms such as impact investments (intended to deliver both financial returns *and* community impact) and rolling funding (small grants deployed to meet an immediate need). Together impact investments and rolling funding accounted for approximately \$3.2 million (2% of investments made in 2025)."

# INSIGHTS ON MOVING FORWARD

As we reflect on this period of transition to a new strategy and new ways of working, we are reminded that evolution is not a milestone — it is a mindset. Meaningful organizational change is an ongoing practice of listening, learning, and growing.

We are committed to learning from our history, past approaches, and how we navigate transitions between strategic plans. One of the most important lessons from this period centers on the reality that the impact our efforts can have on the future of our community is not only a function of data, analysis, and best practices, but also on how we build, sustain, and strengthen trust with our community.

## ***Key Lessons Learned***

**Growth requires capacity.** The growth of the Foundation’s grantmaking and programmatic work impacts every department. In 2024 and 2025, we expanded our team and strengthened our internal structure after taking a thoughtful look at the capacity needed to bring our strategic plan to life and meet the growing needs of the community both today and tomorrow. Ensuring capacity is essential to delivering on our mission with excellence and maximal impact.

**Enter with the exit in mind.** We have learned the importance of planning for sustainability at the very beginning of a funding relationship. Being clear about goals, timelines, and transition plans allows us and our partners to amplify effectiveness and mitigate disruption. This recent shift was most significant for organizations with longstanding funding relationships, and we recognize the weight of that change. Ensuring adequate time, realistic expectations, and transparent communication will remain key to maintaining trust and advancing shared goals.

**Trust-based philanthropy takes time.** Adopting trust-based practices requires more than process adjustments — it requires cultural change. Identifying what needed to shift, and why, called for honest reflection and open discussion among our staff and Board. This collaborative work continues, and we remain committed to aligning our efforts with our values and best practices.

The work reflected in this report has laid the foundation for what we can build upon — alongside our community — to advance health equity. It brings us closer to realizing a vibrant and inclusive Central Texas in which everyone has a fair opportunity to be healthy and thrive.

We move forward energized by the ambitious goals of the *Pathways to Health Equity* strategic plan and grounded in the lessons that will make us stronger partners in the years ahead.