ANNUAL 2022 REPORT

TEXAS 20 36

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Texas 2036 is grateful for the ongoing support of our donors who make our work possible.

AUGUST 2023

LETTER FROM THE PRESIDENT

Dear Friends and Fellow Texans,

As we look back on 2022, we are grateful for your unwavering support and generous contributions in helping Texas 2036 achieve consequential progress toward securing the future prosperity of all Texans.

With millions more people set to call Texas home by 2036, our state faces significant opportunities and challenges in building out our infrastructure, education-to-workforce pipeline, and state government services.

To meet this moment, we have rolled out compelling data and research across our policy areas, including broadband, energy expansion, public safety strategies, water, spending limits, uninsured Texans, and workforce development.

We also reached out to thousands of Texas voters to understand their priorities and concerns ahead of the March party primaries and the November midterm elections.

Last year, our hard-working policy team testified more than 40 times before legislative committees and commissions and prepared hundreds of pages of testimony and thought pieces for our blog.

We updated and expanded our touchstone Strategic Framework to showcase better the data aimed at helping guide policymakers' decisions in the 2023 legislative session and beyond.

We also worked hand in hand with outside policy advisory groups and our own legislative committee throughout the legislative interim to lay out positions on our four priority areas — education and workforce, health care, infrastructure, and government performance.

Finally, we traveled thousands of miles to hold important conversations across the state about moving all of Texas forward through the Texas Roadshow.

We also marked an important leadership at the end of 2022. Tom Luce, who founded and stewarded Texas 2036 into the influential organization we are today, stepped down from his board chairman role. He remains involved as Founding

Chairman of Texas 2036, and will serve indefinitely on the Board of Directors and as an ex-officio member of the Executive Committee.

We were thrilled to welcome Marc Watts as the incoming Board Chairman. His deep involvement, commitment, and Board service over the years uniquely positions him to lead Texas 2036 through the 2023 legislative session and beyond.

We thank you for your belief in our mission and our work, and we look forward to continuing to collaborate with you to create a lasting legacy and impact on our state.

Onward,

[signature]

Margaret Spellings
President and
Chief Executive Officer

LETTER FROM THE CHAIR

Dear Friends,

I write this not just as the Founder of Texas 2036, but as a fellow Texan, passionately dedicated to securing the future of our remarkable state.

Since its inception in 2016, Texas 2036 has been steadfast in its conviction that Texans, united in purpose, data and action, can confront and overcome the most daunting challenges our state faces. In a world where change is a constant, Texas 2036 remains focused on the essential ingredients needed for our growing state to be the best place to live, work and raise a family.

It has become clear that Texas 2036 has become a trusted resource to the benefit of our state. Real progress, measurable progress has been made through an emphasis on long-term planning, systemic transformation, and statewide support built upon a foundation of strong data analysis and research.

As I transition from my role as Chairman of the Board, I am filled with a sense of gratitude and satisfaction. Our dedicated team's transformative work underscores the importance and indispensability of data-driven policy for real, lasting progress.

We have addressed issues crucial to our state's continued prosperity — education, workforce development, health care, infrastructure, natural resources, justice and satefyand fiscal stewardship. As Marc Watts succeeds me as Chairman, I look forward to continuing to serve on the Board of Texas 2036 and remaining engaged in our work as I am as confident as ever that the best days of Texas 2036, and the State of Texas are ahead.

Many of you have been on this journey with us since I first came to you with the seed of an idea that has flourished into the organization Texas 2036 is today. Your

generosity, support, and engagement over the years have been invaluable and you have my deepest gratitude. Your contributions are now bearing fruit, providing informed policy analysis and recommendations vital to shaping policy debates in the coming years.

I often tell my grandchildren: "You'll never exceed your own expectations." Today, let us elevate our expectations for the

Lone Star state. Together, we can secure a prosperous, equitable future for all Texans.

Together for the future of Texas,

Tom Luce

Tom Luce
Founder and
Chairman of the Board

PEOPLE

2022 BOARD OF DIRECTORS

Texas 2036 relies on a talented board of directors to set the strategic direction of the organization.

Taken together, they reflect the strength and diversity of Texas, representing prominent business, academic and civic leaders from different regions of the state. Drawing on their respective backgrounds, communities and experiences, they provide guidance and critical insights into how Texas 2036 can best provide data-driven, future forward policies that will advance all Texans.

Pat Avery *(Port Arthur)*
Ann Barnes *(Houston)*
Tracee Bentley *(Midland)*
Aline Bass Callahan *(Dallas)*
Robert N. Campbell III *(Austin)*
Abel Castro *(Lubbock)*
Amy Chronis *(Houston)*
Roberto Coronado *(El Paso)*
Tony Cucolo *(Austin)*
Ed Escudero *(El Paso)*
Shannon Fletcher *(Fort Worth)*
Julieta Garcia *(Brownsville)*
Eva Guzman *(Houston)*
Andrew Hall *(Amarillo)*
Maynard Holt *(Houston)*
Hunter Hunt *(Dallas)*
Wallace Jefferson *(Austin)*
Ron Kirk *(Dallas)*

Val LaMantia *(McAllen)*
Tom Luce *(Dallas)*
Cynthia Marshall *(Dallas)*
Trent McKnight *(Throckmorton)*
Elaine Mendoza *(San Antonio)*
Kyle Miller *(Dallas)*
Jeanne Phillips *(Dallas)*
Peter Rodriguez *(Houston)*
James Henry Russell *(Texarkana)*
Virginia Schaefer *(Dallas)*
Sheryl Sculley *(Austin)*
Nicole Small *(Dallas)*
Joe Straus *(San Antonio)*
Sam L. Susser *(Corpus Christi)*
Bradley H. Tidwell *(Henderson)*
Marc Watts *(Houston)*
Sonya Medina Williams *(San Antonio)*
Zeynep Young *(Austin)*

"Thanks to Tom's leadership, we are positioned as a highly impactful organization, capitalizing on the talent, expertise, experience, and resources built from the ground up since 2016. I look forward to helping carry forward the torch that Tom lit and continuing the work to build Texas 2036 into the go-to source for thoughtful, data-driven, research-informed policy solutions for our great state."

Marc Watts
Incoming Chair of the Board

STAFF

From a staff of three in 2016, Texas 2036 has grown to a powerhouse team of more than 30 committed thought-leading Texans excited to be working together to secure the future of our state.

Our staff comes from every corner of the state, both urban and rural, and includes Ph.D.s, lawyers, MBAs, educators, policy analysts, data scientists, and public affairs communicators who bring to our work nearly 150 years of bipartisan experience tackling Texas public policy issues.

With offices and staff in Austin, Dallas, Houston, and San Antonio, our team is now frequently sought out by journalists, business leaders, and government officials to provide data and expert analysis on key issues facing the state of Texas.

APPROACH: A STRATEGIC FRAMEWORK FOR THE FUTURE OF TEXAS

In pursuit of a vibrant future for Texas, in 2022 Texas 2036 updated and expanded our pioneering report, *Shaping Our Future: A Strategic Framework for Texas*. This roadmap for Texas' future focuses on three dozen aspirational goals to chart our state's course to long-term prosperity and is rooted in our commitment to tackling the most pressing issues our state faces in the best way we know how: the "Texas way."

The second edition of *Shaping Our Future: A Strategic Framework for Texas* features strengthened relationships between our 36 goals and the indicators we track to measure our progress. With extensive input from stakeholders statewide, this work included replacing, expanding, and consolidating goals as well as reviewing more than 150 indicators to identify the strongest possible data sets currently available.

"The Strategic Framework, with its goals and metrics, is a robust resource for Texas policymakers and leaders as they consider how Texas can be a place of shared opportunity through our bicentennial. Our new platform is meant to be a 'living' Texas dashboard, where metrics will regularly update so everyone can keep track of our state's progress."

Holly Heard, Ph.D
*Vice President of
Data and Analytics*

This framework likely represents the only long-term, comprehensive, statewide strategic assessment of its kind ever constructed in Texas and serves as our theory of action, tying our data and policy work — through measurable, actionable data points — to our aspirational goals for the state.

See the framework in action at **texas2036.org/strategic-framework**.
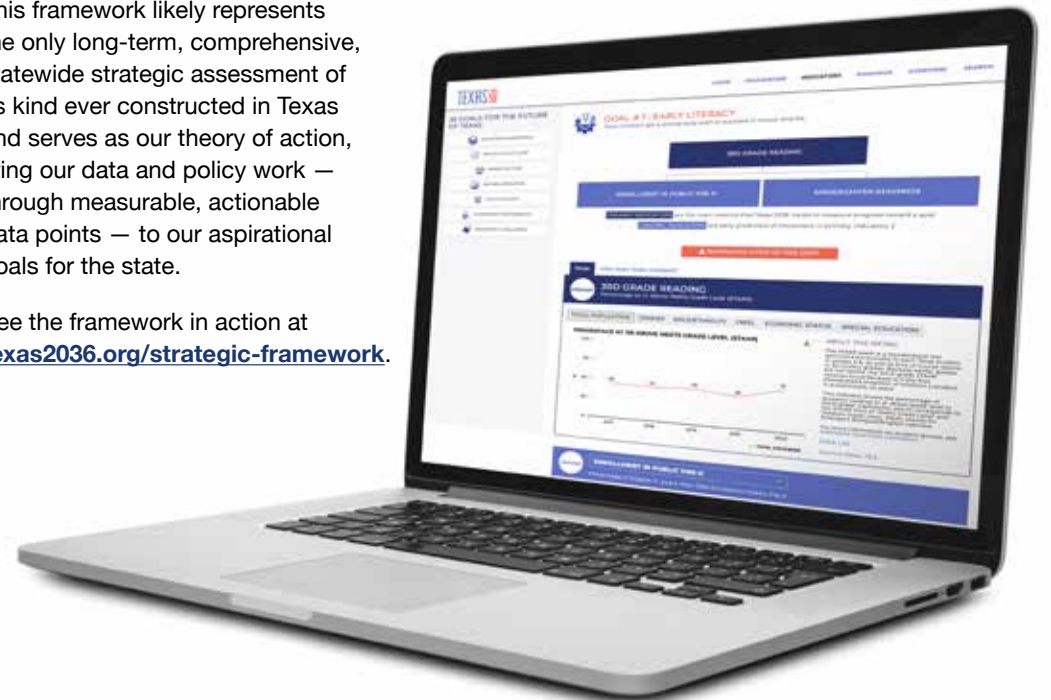
36 GOALS FOR THE FUTURE OF TEXAS

Texas 2036's aspirational goals for Texas to reach by the year 2036, along with the primary metrics by which progress towards those goals will be measured, are summarized on the following pages.

To view the historic and current status of these key metrics – within Texas and, when available, across the nation, we welcome you to visit our Strategic Framework platform at framework.Texas2036.org.

EDUCATION & WORKFORCE
A strong education system today ensures a strong workforce and a prosperous economy tomorrow.

1 **Early Literacy:** Texas children get a strong early start to succeed in school and life.

2 **STEM:** Texans are prepared for careers in STEM fields.

3 **K-12:** Texas students graduate high school prepared to enter college and career.

4 **Postsecondary:** Texas students earn a postsecondary credential to access the jobs of today and tomorrow.

5 **Jobs:** Texans are accessing careers that enable economic security through education and training.

6 **Workforce Needs:** Texans meet the state's current and future workforce needs.

HEALTH & HEALTH CARE
Because of rising health care prices and relatively poor care outcomes, finding good value in health care remains one of Texas' most profound challenges.

7 **Availability of Care:** Patients throughout the state have access to a variety of quality care options.

8 **Patient Affordability:** Price is not a barrier to needed care for Texans.

9 **System Affordability:** Health care system costs are sustainable and represent good value.

10 **Health Outcomes:** Texans live long, healthy, and productive lives.

11 **Health Care Quality:** Health care services produce positive, measurable outcomes to patients.

INFRASTRUCTURE
Reliable and varied infrastructure is the backbone of the Texas economy.

12 **Mobility of Goods:** Texas enables economic growth by moving goods efficiently.

13 **Transportation Safety & Reliability:** Texans can travel to their destinations safely and reliably.

14 **Digital Connectivity:** Texans can digitally participate in economic opportunities and essential services.

15 **Electricity Cost & Reliability:** Texas maintains a sufficient, reliable, and cost-competitive electricity infrastructure.

NATURAL RESOURCES
Abundant natural resources have allowed Texas to prosper, but continued success depends on balancing economic growth with stewardship of air, water, and land.

16 **Quality of Air:** Texans have clean air.

17 **Sustainable Water:** Texans can rely on a sustainable water supply.

18 Quality of Water: Texans have clean water.

19 Parks and Wildlife: Texas enhances and protects its state parks, public and private open spaces, and wildlife.

20 Agricultural Production: Texas leads in agricultural production with responsible natural resource stewardship.

21 Energy Production: Texas leads in energy production with responsible natural resource stewardship.

JUSTICE & SAFETY

The Texas justice and safety systems should aim to keep every person safe, especially society's most vulnerable.

22 Public Safety: Texans are protected from threats to their well-being and property.

23 Justice System: Texans are served effectively, efficiently, and impartially by the justice system.

24 Protection for the Vulnerable: Texas protects the vulnerable from traumatic experiences.

25 Safety Net: Texans have access to resources to meet basic needs when they are in crisis.

GOVERNMENT PERFORMANCE

High-quality, cost-effective public services drive economic growth, improve Texans' quality of life, and build trust in government.

26 Confidence in Government: Texans have confidence in the public institutions that serve them.

27 Civic Engagement: Texans actively participate in governing their communities.

28 Fiscal Sustainability: Texas needs stable, reliable revenue sources to finance state operations, invest in long-term growth, and minimize liabilities.

29 Competitive Taxes: State tax rates attract and retain businesses while sustaining government operations and investments.

30 Long-Term Obligations: Texas strategically manages state expenditures to deliver the best value to taxpayers.

31 Talent in Government: The public sector attracts and retains the talent needed to deliver excellent service and get results.

32 Proven Modern Methods: The Texas state government uses data-driven and proven modern methods to drive towards shared goals.

33 Crisis Readiness: Texas is ready to address the human, economic, and environmental consequences of natural disasters.

PROSPERITY & WELL-BEING

Increased prosperity and well-being statewide, through 2036 and beyond, ensures current and future Texas generations of Texans will thrive.

34 Economic Growth: Texas spurs economic growth through an innovative and business-friendly climate.

35 Quality of Life: Texas is the best place to live and work.

36 Economic Opportunity: Texans have the opportunity to attain a middle-class life.

2022 MILESTONES

As we looked toward the 88th Legislative Session, Texas 2036 was hard at work drilling down into the policy issues that matter most to Texans. We rolled out compelling data and analysis across our policy areas, solidifying our reputation as a trusted resource for legislators, business and community leaders and the public. We prepared hundreds of pages of future-forward policy research that were shared with legislative committees, government commissions, agencies, businesses, non-profit organizations and civic groups, as well as through hundreds of blogs, social media and press coverage.

Working hand-in-hand with outside policy advisory groups and our own legislative committee throughout the legislative interim, we focused our public policy engagement efforts primarily on four priority areas: education and workforce, health care, infrastructure, and government performance.

EDUCATION AND WORKFORCE

A strong education system today ensures a strong workforce and a prosperous economy tomorrow. In 2022 we…

1. Continued to expand **Aim Hire Texas (AHT)**, our statewide coalition working to increase the number of Texans earning a living wage and strengthening the state's workforce. In 2022, AHT worked with state agencies, including the Texas Education Agency (TEA), Texas Higher Education Coordinating Board (THECB), and Texas Workforce Commission (TWC) to implement the Tri-Agency Workforce Alignment Act. This included the development of statewide education and workforce goals, aligned strategies to achieve those goals, and metrics for monitoring progress. See **aimhiretexas.org**.

2. Cultivated, in a collaborative realignment with InvestEdTx, support for a strong **Accountability and Assessment** system in our state's public schools, with plans to include polling, focus groups, stakeholder convenings, data analysis, and policymaker engagement.

Next Up: The coalition is focused on TEA's regulatory updates of the A-F education accountability system, implementation and expansion of data-driven education policy interventions, and educating policymakers on the importance of closing equity gaps through a strong and fair assessment and accountability system.

"Texas is facing significant challenges in the labor market. These challenges are driven by the fact that the traditional pathways to the workforce are broken for the majority of Texans. The 88th Legislative Session can drive systemic change to meet workforce demand and provide value to students."

John Hryhorchuk
Senior Vice President of Policy and Advocacy

3. Built and released a **Community College Finance Simulator** that allows Texans to explore how funding to community colleges is allocated and what impacts adjustments to the state funding formula have on individual college districts and the state budget. The tool also models the Texas Commission on Community College Finance's recommendations, which aim to promote student success, equity, and closer program alignment with local workforce needs. See texas2036.org/simulator.

Next Up: Legislation to implement the recommendations of the Texas Commission on Community College Finance is anticipated in 2023.

4. Published the **Regional Workforce Dashboard**, which analyzes publicly available state and federal data about Texas's education-to-workforce pipeline to reveal challenges and opportunities in aligning the type of systems. See texas2036.org/data.

5. Developed and launched the **Advanced Coursetaking Dashboard**, which illuminates disparities in access to advanced coursework, like Algebra I in 8th grade and AP/IB, in high schools across the state to inform the work of the Texas Commission on Virtual Education. See texas2036.org/data.

Next Up: The Texas Commission on Virtual Education utilized this data to develop their policy recommendations, which were finalized in late 2022. Legislation to implement the Virtual Education Commission's recommendations is anticipated in 2023.

"Community colleges are uniquely positioned to meet the state's growing demands for skilled labor through quick and affordable pathways to earn credentials and ultimately self-sustaining wages."

Renzo Soto
Policy Advisor

"At Texas 2036, we believe strongly in a valid, reliable, and transparent assessment and accountability system. Students are our state's future. We owe a special duty to them to provide the best, highest-quality public education that we can. This need is particularly urgent given the Covid-19 pandemic."

Mary Lynn Pruneda
Senior Policy Advisor

HEALTH

For far too many Texans, health care has become unaffordable – to the point of being unobtainable.

Our goal is that Texans can get the care they need when they need it. Barriers to care – such as a lack of providers in a community or a lack of affordability – prevent Texans from accessing needed care, contributing to unhealthy outcomes and high rates of medical debt. Our data shows that the price of health care – even among those with insurance – is causing people to skip the care they need.

In 2022 we…

1. Launched **Who Are the Uninsured in Texas?**, a multi-year study designed to better understand the uninsured population and related challenges. Phases 1 and 2, comprising focus groups and population-level surveys of over a thousand uninsured Texans, was completed in late 2022. This groundbreaking research identified that about half of uninsured Texans are employed and earning 200% of the federal poverty level or above, meaning that policy interventions outside of the traditional Medicaid expansion discussions could make a sizable impact. See preliminary report at texas2036.org/uninsured.

Next Up: Phase 3, an evaluation of high-value policies to meet the identified needs, is underway in 2023. Lawmakers seeking to address the state's high uninsured rate are anticipated to pursue solutions to address the high number of uninsured Texans who are outside of the Medicaid coverage gap.

"We hope and believe this study will help policymakers and elected officials chart paths and devise solutions that all sides can rally around to effectively reduce the number of Texans who face unexpected medical debt or who skip care due to cost."

Charles Miller
Senior Policy Advisor

2. Rolled out the **Health Price Transparency Dashboard**, which comprehensively details the compliance of all 644 Texas hospitals subject to state and federal price transparency rules, and catalyzed the adoption of strict penalty requirements for non-compliance.

Our most recent analysis from October 2022 shows that compliance is now up dramatically statewide, having nearly doubled to 60% from around 30% in April. Findings also confirm that prices vary widely for the same service between hospitals in the same area, and sometimes even within the same hospital depending on payer. See pricetransparency.texas2036.org.

Next Up: In 2023, we are beginning bi-annual data pulls of all hospital price transparency files and analysis of their compliance level.

3. Followed through on **implementation of major legislative victories** from 2021, including by working with agencies to ensure price transparency rules were drafted to accord with legislative intent and that complex insurance subsidy reform was implemented with fidelity.

Learn More: Read the deep dive on how following through with implementation can significantly improve the lives of hundreds of thousands of Texans.

Impact Case Study: Expanding Health Coverage

In 2020, Texas 2036 began work on a comprehensive data tool – the Health Coverage Policy Explorer – to model the state fiscal impacts of various policy options to reduce the number of uninsured Texans. One of numerous scenarios in this tool involved a "focused rate review," which was projected to increase the number of insured Texans by 216,000 at minimal state cost. The Explorer noted:

Texas does not currently conduct review of premium rates filed for Affordable Care Act (ACA) Marketplace Plans. Traditionally, review of insurance premium rates has been focused on overall premiums. The ACA premium subsidy dynamics are non-intuitive and complicated — what most consumers pay is not directly related to overall premiums. Unfortunately for consumers and insurers, unchecked premium rate development has led to premium misalignment resulting in approximately $500 million in underfunded premium subsidies in Texas, higher net premiums for subsidy-eligible enrollees, and lower enrollment.

For a negligible cost, the Texas Department of Insurance could review premium rates with greater focus; enforced compliance would initially result in a larger share of premiums being paid by the federal government. This would attract a larger, healthier population and ultimately reduce average costs and premium rates in the marketplace.

The impact of this initiative would increase the amount of federal subsidies flowing to Texas. This would not only reduce net premiums for many Texans, but would also increase the amount of federal funds that would be available for the state should it choose to pursue a future 1332 Waiver. Because of this, should Texas wish to pursue a 1332 Waiver, it should first conduct Focused Rate Review. Relative to other options states have considered, there is minimal additional cost associated with focused rate review efforts.

In 2021, the legislature unanimously passed SB 1296, which provided the Texas Department of Insurance with the authority to conduct rate review for health insurance policies offered on the ACA Health Insurance Marketplace. Behind the scenes, Texas 2036 worked with legislators and TDI agency staff to ensure that the bill was implemented correctly.

The results were a great success, leading to decreased net premiums for hundreds of thousands of Texans. In combination with increased federal subsidies, the 2023 Open Enrollment period resulted in a record-high enrollment of over 2.4 million Texans, an increase of nearly 600,000 from the previous year.

INFRASTRUCTURE & NATURAL RESOURCES

Reliable infrastructure and carefully managed natural resources are the backbone of the Texas economy. In 2022 we…

1. Continued to engage on behalf of communities and sectors to expand broadband access, improve digital literacy, and close the digital divide through the **Digital Texas** coalition. In 2022, we supported implementation of HB 5, passed in the 87th session, and welcomed United Ways of Texas to the Digital Texas executive committee. The Texas Broadband Development Office, to which Texas 2036 has served as a thought partner, also released the state's first-ever Broadband Plan in June, outlining guiding principles to close the digital divide, synthesizing data from the office's statewide listening tour, and providing areas of focus for its future work. See **digitaltexas.org**.

2. Launched a project to model the **economic impacts of different future energy portfolios** for the state. These models will assess the employment, GDP, and state revenue growth patterns associated with different energy portfolio compositions in order to identify the pathway that would provide greater economic prosperity to the state with the least amount of emissions.

   Next Up: This research is anticipated to be completed in late 2023.

3. Initiated the **Texas Water Markets Study**, in partnership with Lyda Hill Philanthropies and Collaborative Water Resolutions, as a potential water management strategy that improves both water conservation and use efficiency. This effort includes two case studies of working water markets in Texas. This forthcoming report describes the benefits associated with water markets and includes a template for state and local policymakers and water managers for the development and deployment of markets within designated regions.

   Next Up: This report is anticipated to be completed in mid-2023.

Interim Accomplishments: Infrastructure and Natural Resources

In 2022, Texas 2036 worked with state agencies to help improve implementation of important legislation. For example, Texas 2036 proposed changes to the Railroad Commission of Texas' proposed rules for carbon capture and underground sequestration (CCUS). These rules aimed to clarify the applicability of the proposed rules, ensure alignment with federal statutes providing tax credits for carbon capture projects, and broaden public notification processes for proposed CCUS projects. These recommendations were adopted by the Commission in the final rule.

Texas 2036 also worked with the Sunset Advisory Commission during its review of the operations of multiple state agencies. For example, Texas 2036 proposed modifications to Sunset Commission recommendation for the Texas Water Development Board (TWDB) that include allowing regional water planning groups to use droughts worse than the Drought of Record as the basis for water planning; encouraging TWBD to consult with the Office of the State Climatologist on drought and flood trends; and requiring that the Legislature incorporate performance metrics in the state budget to track TWDB's performance in processing applications for financial assistance. These recommendations were adopted by the Sunset Commission in 2022.

4. Developed the **Legislative Blueprint for Addressing Texas' Water Infrastructure Crisis**. Years of neglect, underinvestment, and an aging infrastructure have adversely affected many of Texas' 10,000 plus water and wastewater systems. After gathering input from more than 40 stakeholders across 2022, Texas 2036 began drafting a policy blue blueprint based on their guidance. This policy blueprint offers findings and recommendations that would maximize the state's drawdown of federal Infrastructure Investment and Jobs Act (IIJA) dollars. It also articulates state policy opportunities, including a long-term investment strategy, to address the state's aging water and wastewater systems. The Blueprint was released in early 2023. See **texas2036.org/water-blueprint**.
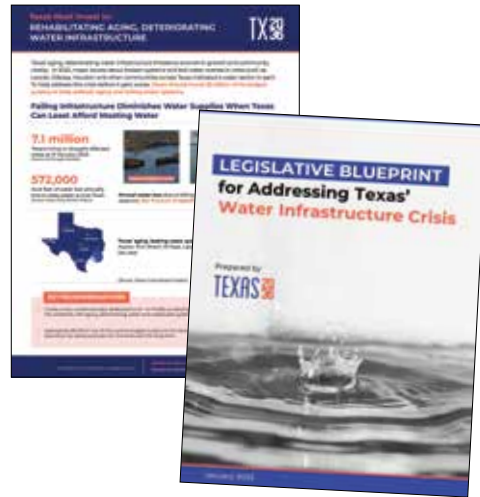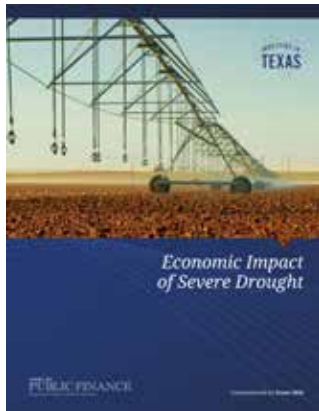
"After stories of catastrophic water system failures in Odessa, Laredo and even Jackson, Mississippi, Texans are worried about their water supplies and the condition of their water infrastructure. The 88th Legislature has the opportunity to address these concerns by establishing and capitalizing a new fund dedicated to fixing our aging, deteriorating and leaking infrastructure.

This fund should be aligned with smart policies oriented towards identifying water systems that are failing or at-risk of failing, forging better outreach to areas with water problems, and structuring regional solutions where communities work together."

Jeremy Mazur
Senior Policy Advisor

JUSTICE & GOVERNMENT PERFORMANCE

The Texas justice and safety systems should aim to keep every person safe, especially society's most vulnerable. High-quality, cost-effective public services drive economic growth, improve Texans' quality of life, and build trust in government. In 2022 we…

1. Released the **Texas Law Enforcement Data Landscape Report**, which explores the Texas Commission on Law Enforcement's (TCOLE) data collection and management issues along with hiring and disciplinary procedures, with a view toward transparency, accessibility, and accountability. This data was shared with the Sunset Advisory Commission, informing their discussions about the structure and operations of TCOLE and its quality.

2. Released the **Investing in Texas** reports in partnership with the Center for Public Finance at Rice University's Baker Institute of Public Policy. These five reports focused on ways the state could leverage federal funds and state revenues to pursue impactful investments that could benefit Texans for generations. The five reports covered Broadband, Energy Expansion, Water/Drought, Cybersecurity and IT Modernization, and State Parks. Examples of findings included that investing in state parks resulted in an outsized economic development impact for rural Texas communities.

3. Began work on the **IMPACT Report: Modernizing Texas' Child Welfare IT System**, analyzing the child welfare information technology system and discussing the need for the state of Texas to update 1990s technology to protect Texas' most vulnerable residents. This report was released in early 2023.

By offering integral nonpartisan ideas and modern solutions grounded in research and data, Texas 2036 is breaking through the gridlock on issues that matter the most to all Texans.

We encourage government accountability and more demand for responsible, long-term, informed state policies and investments. The result: empowering our citizens to thrive and the economy to flourish over the years ahead.

Next Up: This report was released in January 2023.

"Investing in a modern platform for tracking child welfare cases will save the state from continuing to place Band-Aids on a long outdated system. The beneficiaries are not just the children in the system but the caseworkers who dedicate their lives to help those children."

Hope Osborn
Manager of Policy and Advocacy

"Texas has an opportunity to make significant improvements to the regulation of law enforcement. The men and women who serve Texans every day deserve a regulatory structure rooted in good data, transparency and accountability. This report helps set the stage for how Texas can address wandering officers, standards and policies for law enforcement agencies and other pressing issues. We stand ready to provide information to lawmakers as they review these issues and recommendations."

Luis Soberon
Policy Advisor
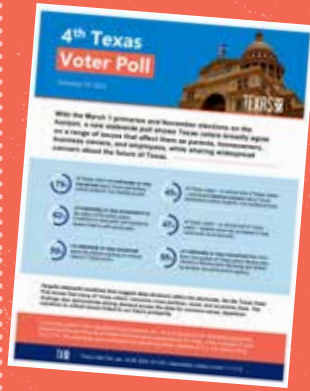
2022 KEY HIGHLIGHTS

JANUARY

Criminal Court Backlog Analysis

Rulemaking Comments on Carbon Capture and Underground Storage

FEBRUARY

4th Texas Voter Poll

MARCH

Comments on State Workforce Development Goals

APRIL

Electric Vehicle Poll Results

Texas 2036 Comments on Texas Water Development Board Sunset Report

Community College Finance Simulator launch - Phase 1

Texas 2036 testifies on broadband expansion

Texas 2036 comments on the bipartisan infrastructure law

Baker Institute Report: Investing in Texas: 21st Century Energy Capital of the World

MAY

Teacher Shortage: What We Know and Don't Know

Comments on State Workforce Development Strategies

Baker Institute Report: Investing in Texas: Evaluating Prospects for Expanding Broadband Access

JUNE

Baker Institute Report: Investing in Texas: Cybersecurity and IT Modernization

Texas 2036 presented to testimony to the Texas Commission on Virtual Education

Baker Institute Report: Investing in Texas: Economic Impacts of Severe Droughts

"We are at an inflection point. Texas 2036 understands it is important for us to take the time to think big, ask the right questions, bring together Texans to tackle clear, data-driven objectives, and make sure future generations look back and know we made every taxpayer dollar count."

Margaret Spellings
President and Chief Executive Officer

JULY

Baker Institute Report: Investing in Texas: State Parks Are Rural Economic Engines

Texas 2036 Action Center continues to generate feedback from Texans across the state

AUGUST

Health Price Transparency Dashboard launched

Texas Road Show wraps up inaugural year in Longview and Tyler

SEPTEMBER

5th Texas Voter Poll

Texas 2036 testifies on IT investment needs

Railroad Commission of Texas adopts several recommendations to the carbon capture and underground storage rules

Community College Finance Recommendations, supported by Texas 2036, are adopted

Texas 2036 presents data at the Texas Lyceum's Panhandle Conference

OCTOBER

Uninsured Study Preliminary Findings released

Texas 2036 Analysis of Learning Loss and Resulting NAEP and STAAR results

Texas's State Budget: Outlining Top Priorities

NOVEMBER

ACA Marketplace Enrollment Analysis released

Legislative Agenda for 88th Session published

Texas Law Enforcement Data Landscape report published

Strategic Framework: Second Edition released

DECEMBER

Texas Budget Surplus and Spending Limits

Privately-Issued Credentials Initiative

Health Price Transparency Dashboard updated

Advanced Coursetaking Dashboard

ENGAGING TEXANS

TEXAS VOTER POLL

The Texas Voter Polls, conducted by Baselice & Associates, offer an essential roadmap for future state action on fundamental issues from voters across party lines. Despite statewide headlines that suggest deep divisions within the electorate, our 4th and 5th Texas Voter Polls, published in February 2022 and September 2022, showed that Texas voters share concerns — and solutions — across partisan lines. There is strong demand across the state for common-sense, bipartisan solutions to critical issues linked to our future prosperity. These polls provide crucial insights into the needs of Texans and will continue throughout 2023 and beyond.

Key Highlights

- 87% of Texas voters support the use of annual reading and math tests to provide "apples-to-apples comparisons" of how local schools are performing relative to others in the state.

- Nearly 90% of Texas voters believe it is important for the state to focus on increasing the number of post-secondary credentials while students are still in high school to ensure they graduate college- and career-ready.

- While 68% of Texas voters said they trust their local law enforcement, 84% say it would increase their confidence in law enforcement if lawmakers improved public transparency around law enforcement licensing and training.

- 82% of Texas voters agreed that the state should increase investments to expand our water supplies, and 84% supported the Texas Legislature creating a fund to help update the aging infrastructure.

- By a 2-to-1 margin, Texas voters support increasing pay to attract talent for all state government positions.

"When seven out of 10 Texas voters tell us that they are exceedingly concerned about the state's future, it's time to strengthen our focus on the policies Texas leaders have been working on, such as education and workforce issues, infrastructure, health care affordability, and public safety.

The good news is that there is clear voter support for state action on these issues, and we at Texas 2036 plan to continue to highlight those areas where we agree and build civic demand around them to create a bright future for all Texans."

Margaret Spellings
President and Chief Executive Officer

TEXAS ACTION CENTER

The success of Texas 2036's work depends on Texans who weigh in on the most important issues facing our great state. After all, we all play a role in shaping our future. In addition to our Texas Voter Poll, we launched Texas 2036's Action Center in 2022. With almost two dozen surveys, Texans are invited to engage on questions like "If you were a lawmaker…", "Where should the state spend its budget funds" and "How confident are you in law enforcement?"

See **texas2036.org/action**.

COALITIONS

Aim Hire Texas: In 2022, Texas 2036 continued to expand Aim Hire Texas, our statewide coalition working to better align our state's education and workforce systems and increase the number of Texans earning a living wage. This effort also addresses complementary goals of improving access to opportunity for Texans alongside the educational pipeline for Texas employers. In the last year, this integral coalition grew from 40 to over 75 members.

See **aimhiretexas.org**.

Digital Texas: Through a collaborative partnership with Texas Rural Funders, the Greater Houston Partnership, and the United Ways of Texas, the Digital Texas coalition continues to advocate on behalf of communities and sectors to expand broadband access, improve digital literacy, and close the digital divide. This effort led to the unanimous passage of House Bill 5 in the 87th Texas legislative session, an omnibus broadband law that improves state planning and data. In the last year, this statewide coalition has grown to more than 50 partners.

See **digitaltexas.org**.

TEXAS ROAD SHOW

We traveled thousands of miles in 2022, from El Paso to Texarkana, Amarillo to Brownsville, and many stops in between, to hold important conversations about moving all of Texas forward. We conducted 65 meetings in 10 regions of the state, spanning 18 cities, and met with more than 800 officials, community and business leaders, resident experts, city officials, and other stakeholders.

Here's what we learned during our Texas Road Shows:

- <u>Texans are more alike than different.</u> Whether in Corpus Christi or Houston, we heard the same things: The people of Texas want a fair shot at economic prosperity and well being, from education access to affordable health care.

- <u>Rural communities are the bloodline of our state.</u> Our smaller towns deserve more recognition for keeping Texas thriving. From agriculture to energy and everything in between, these communities host industries that put us on the map and remain as economic drivers.

- <u>Infrastructure is a problem to solve across Texas.</u> These challenges cross city limits — our roads and bridges need improvement. Aging pipes carrying water throughout our cities are deteriorating. Our waste management systems and public parks are in need of investments. This is our opportunity to take care of future Texans today.

- <u>All Texans need to be online.</u> Vast expanses of rural areas and thousands of urban pockets remain disconnected. We are only as strong as our weakest connection. Broadband is the farm-to-market road of the 21st Century.

- <u>We need a stronger workforce.</u> From investing in education-to-workforce pipelines to incentivizing talented Texans to give back to their communities, we need to be more competitive when it comes to our labor market. We can't afford to be a great exporter of talent.

- **Economic development remains on Main Street.** Whether their host community has a population of 1,000 or 4 million, the mom-and-pop shops and small businesses of our state are making a difference in providing Texans a higher quality of life — even if it's through one specialty coffee at a time.

- **Texas hospitality is as strong as ever.** It's no secret, we're growing at a rapid rate — millions more people will likely call the Lone Star State home by 2036. Despite these rising numbers, the friendliness of Texans is alive and well.

- **Local leaders are hard at work.** From municipal governments and chambers of commerce to nonprofit and civic organizations, the leadership in our towns, cities, and metropolitan areas across Texas remains strong.

- **Collaboration is key to the state's success.** From the RGV Partnership in the Rio Grande Valley to the Borderplex Alliance in El Paso and SATX in San Antonio, where we saw a regionalized approach to economic development, we also witnessed more opportunities for each respective community. To make sure our state is the best place for future generations to live, work, and raise a family, we need to keep working together.

"This expansive 10-region, statewide Road Show, has facilitated meaningful discussions on the vital issues that resonate with local communities, igniting the collective effort needed to champion data-driven issues that will be considered at the Texas Capitol."

A.J. Rodriguez
Executive Vice President

2021 STOPS
San Antonio, Rio Grande Valley, Houston and Corpus Christi

2022 STOPS
El Paso, Texarkana, Nacogdoches and Lufkin, Lubbock and Amarillo, Midland and Odessa, Longview and Tyler

PARTNERSHIPS

Texas 2036 has become a trusted resource for data and thought leadership, thanks to the sustained partnerships that we cultivated and strengthened over the past year:

- The Donor Advisory Committee includes those who have made financial gifts of $250,000 or more and lend their invaluable expertise and guidance.

- We convened and engaged with dozens of policy experts through the Texas 2036 Policy Advisory Groups in each of our six policy pillar areas. With backgrounds in academic, practitioner, business and policy communities, each Policy Advisory Group member brings a wealth of experience to Texas 2036. These groups work with our policy staff to review historical, current and projected state performance; advise on best practices; provide input on policy recommendations; and serve as strategic thought partners.

- We have cultivated strong relationships with Texas public officials across the political spectrum and with some of the state's foremost business and policy leaders, who have joined our bipartisan Legislative Committee that provides guidance on legislative action.

- We served as the official data partner of the Texas Lyceum, showcasing data at quarterly conferences in El Paso, Amarillo and Longview.

"While fiercely independent, Texans, time and again, have joined together to overcome tremendous challenges. Solving the biggest issues facing the future of the Lone Star State requires innovation and hard work that is only possible and sustainable through collaboration. And Texans are up to the task."

Justin Coppedge
Senior Vice President, Strategy and Operations

ADDITIONAL PARTNERS

Advanced Coursetaking Dashboard: January Advisors

Aim Hire Texas: 75+ state and national organizations, employers, and educational institutions.

Digital Texas: Texas Rural Funders, United Ways of Texas, Greater Houston Partnership, Texas Manufacturers Association, and 50+ more partners

Baker Paper Series: Center for Public Finance at Rice University's Baker Institute

Health Coverage Modeling: Carruth & Associates and Axene Health Partners

Community College Finance Simulator: The Texas Schools Project at the University of Texas at Dallas, Matt Richmond

Data Democratization: University of Texas at San Antonio Urban Education Institute, Ajah, January Advisors, and HackerEarth

Future of Texas Energy Scenario Modeling: FTI Consulting

Hospital Price Transparency: January Advisors

Modernizing Texas' Child Welfare IT System: Texas Alliance of Child and Family Services

Optimized Workforce Data Ecosystem: U.S. Chamber of Commerce Foundation, Martin Policy & Strategy, and Ajah

Privately-Issued Credentials Initiative: Grow with Google, Credential Engine and DataSmith Consulting

Strategic Framework: January Advisors and Knoema

Texas Law Enforcement Data Landscape: Benchmark Analytics and January Advisors

Water Markets: Todd Votteler

Who are the Uninsured?: Cicero Group

Community organizations like the Dallas Citizens Council, Dallas Regional Chamber and advocacy groups like the Texas Association of Business and Texas Association of Manufacturers are also critical partners in the work of building a coalition.

COMMUNICATIONS & ENGAGEMENT

In 2022, Texas 2036 had a successful year in expanding its reputation as the state's premier nonpartisan, nonprofit public policy organization. The communications team focused on raising awareness and building relationships with reporters, policymakers, influencers, stakeholders and target audiences that would position the organization's leadership and staff as thought leaders in key policy areas.

One of the most significant communications accomplishments was our website, which received more than 138,000 visitors and firmly established Texas 2036 as a trustworthy resource across the wide range of issues the policy and data teams were working on prior to the 2023 legislative session. In 2022, Texas 2036 added a new Spanish page, built out each of the six Policy pages, designed new landing pages for releases and reports, and added a prominent Strategic Framework section, making it a dynamic information hub ahead of the November launch of the new data-driven dashboard.

Texas 2036 also produced 200 blogs that identified, analyzed and highlighted key data and policies that proved a go-to resource for reporters seeking experts and data for stories, and legislative staff and stakeholders.
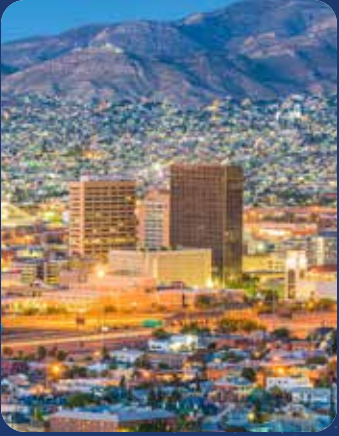
The communications team also expanded our newsletter program, reaching more than 10,000 Texans by the end of the year. Texas 2036's two weekly newsletters highlighted key insights and quotes, leveraged video and photos, and encouraged feedback through a newly launched Action Center. This approach helped us build both awareness and engagement, creating a community of informed citizens committed to making a difference in Texas.

Texas 2036's social media was equally successful, in part due to the focus on engaging content with strong visuals. By the end of 2022, the organization had added more than 14,000 new followers across our channels, for a total of 54,000. Texas 2036's Twitter account, in particular, became a real-time source of information for many Texans, with our content reaching more than 400,000 users per month by the end of the year.

On Facebook and Instagram, Texas 2036 continued to build a strong following, adding videos, visuals and stories to engage our audience. And on LinkedIn, the communications team created a newsletter that has organically attracted hundreds of followers. Using various

platforms and approaches, the organization reached a diverse range of Texans and established itself as a leader in public policy.

Finally, Texas 2036's ambitious outreach to reporters was a significant success, connecting local, statewide and national media outlets with our leadership and policy experts. By the end of the year, more than 750 published articles, broadcast shows and op-eds, including Spanish-language media outlets, had mentioned Texas 2036 or its leaders, generating vital, urgent public policy conversations across Texas and beyond.

All of these achievements in 2022 laid a solid reputational foundation and built important relationships that have proven essential in supporting Texas 2036's legislative agenda in the 2023 legislative session.

2022 MEDIA MENTIONS

"Texas 2036 was born out of a love for Texas and a recognition that vigilance is required to ensure we enjoy a future that sustains and expands opportunities for all who call this great state home."

Tom Luce
Founder

2022 FINANCIALS

FISCAL YEAR 2022 (Jan. 1 - Dec. 31)

Funds Raised*

13% INDIVIDUALS

$12.1M

87% CORPORATIONS AND FOUNDATIONS

Expenses

9% FUNDRAISING

74% PROGRAM

$10.7M

17% OPERATIONS

* *$12.1M in funds raised is comprised of $6.1M in new cash gifts and $6.0M in payments of pledges made in prior years. Revenue for FY 2022 is $9.1M which is made up of $6.1M in new cash gifts, $1.7M in pledges made in FY 2022 payable in FY 2023 and beyond, and $1.3M in cash collected in prior years recognized as revenue in FY 2022.*
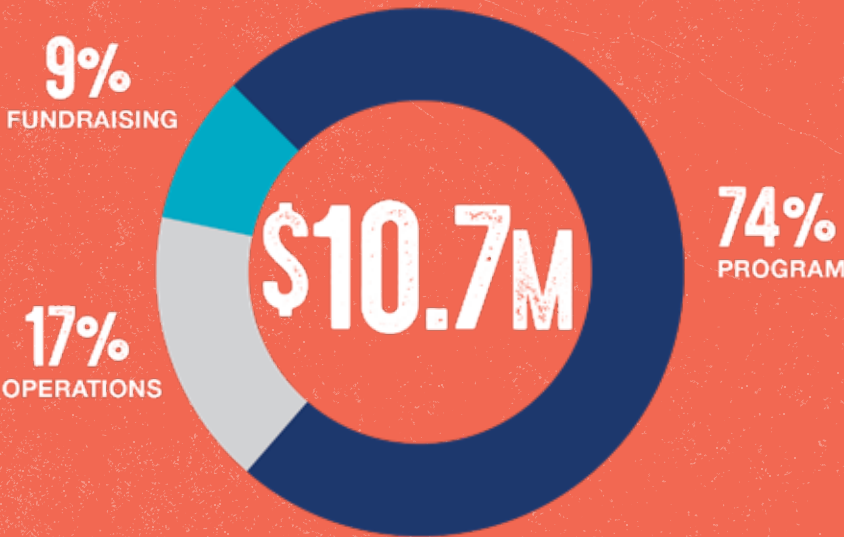
DEVELOPMENT HIGHLIGHTS FOR 2022

96 NEW DONORS

23 donors increased their gifts in 2022

79 of our repeat/retained donors maintained or increased gifts in 2022

2022 was a banner year for raising money through the Communities Foundation of Texas' North Texas Giving Day campaign, where Texas 2036 raised more than $25,000 with online gifts and designated grants

Donations came from throughout the state, with a breakdown that includes every corner of the state:

45% North Central Texas

6% East Texas

10% Southeast Texas

20% Central Texas

6% South & Southwest Texas

8% West Texas & the Panhandle

We also received about 5% of our gifts from outside of Texas.

228 donations in 2022

150 donors have given consistently since March 2018, and our donor retention rate continues to increase

SUPPORTERS

Anonymous Donors

Nancy and Mark Abernathy

Jessi Acuña

Suzzanne Gamboa and Luis M. Acuña

Suzanne and John Adams

Elaine and Neils Agather

Sherry Alexander

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Watch for our next Legislative Report following the 88th Legislative Session to see how Texas moves forward.

TEXAS 2036

Texas 2036 is a nonprofit organization building long-term, data-driven strategies to secure Texas' prosperity through the state's bicentennial and beyond. We offer nonpartisan ideas and modern solutions that are grounded in research and data on issues that matter most to all Texans.

Vision: Texas is the best place to live and work.

Mission: To enable Texans to make policy decisions through accessible data, long-term planning and statewide engagement.

TEXAS2036.ORG