

values

ethics

character

spiritual
reciprocity



building
communities

sharing the
blessings

making a
difference

working
collaboratively



OUR MISSION

is to foster human development—spiritual, intellectual, physical and psychological—and to enhance the work of people and organizations devoted to exemplary service in the community.

OUR GUIDING PHILOSOPHY

is to invest in values, ethics and character formation; to support the efforts of those who are successfully making a difference in people's lives; and to help build the communities in which we live. We believe in sharing the blessings which have been bestowed on us and in celebrating the spiritual reciprocity between donors and receivers working collaboratively to make the world a better place.

TABLE OF CONTENTS

Letter from the President	2
Our Interests	4
2000 Summary of Grants Paid	4
Integrated Healing	5
Educational Opportunity	7
Youth Development	9
Overcoming Barriers	10
Environment	11
International Development	12
Spirituality	12
Sustaining Grants	14
Financial Summary	15
Application Instructions	16



Shortly after his release from prison, Nelson Mandela spoke to his followers. “I am more convinced than ever before, it is not kings and generals that change history it is the... people.” In our emerging work as philanthropists we are struck again and again by the fact that change occurs when people of vision commit to their calling and find ways to join unselfishly with others to make our world a better place. We sometimes make mistakes, but when we find these rare individuals, we invest in them and partner with them in their work.

The record of our grantmaking for 2000 is writ large with their stories. We are pleased to report that on the list this year is a gift to the Nelson Mandela Foundation. We wanted to acknowledge and celebrate the work of this brave, decent and dedicated man who, in helping to resolve conflicts in Africa, provides a moving example for all of us.

We continue to grow in our foundation work and to try to stay focused on aligning our passions, values and highest philanthropic priorities. As Bill said in his remarks on Public Radio regarding the new philanthropy, “we need to be wise, we need to be effective, and most importantly we should give based on our most deeply held values. The measure of our success, or ‘our ROI’ if you will, is not measured in dollars but in the lives changed, in values buttressed, in justice achieved, and in faith and healing.”

We believe that encouraging the development of youth leadership is critical to building social capital in our communities. Grants made to the Summit Academy-OIC, to the Sigma Chi Horizons program, Twin Cities Rise! and the young refugees at Abraham Lincoln High School have given us particular satisfaction. Each successful graduate of these imaginative and rigorous programs will bring commitment, new energy and responsibility to their lives and to those around them.

Recognizing that all formal education should be preparation for citizenship, we have established the George Fellows program. Our George Fellows continue to flourish in academic settings across the United States. We are certain that young people exhibiting extraordinary promise for academic achievement and service should not be deterred by the escalating costs of higher education. More than 40 students both international and U.S. born have now received fellowships at Harvard Business School, Macalester College, the University of St. Thomas, the Hamm Clinic, Carleton

College, Georgia Tech and Amherst College. We commend their work and the commitments of our partner institutions.

Approximately 40% of our grants went to integrative medicine in 2000. Our grants have supported innovative changes in medical school curricula, clinical care models, and research. We are funding integrative initiatives at the Virginia Piper Cancer Institute, the Minneapolis Heart Institute/Abbott Northwestern Hospital, Scripps Center for Integrative Medicine, the University of Minnesota’s Center for Spirituality and Healing, Duke University and other centers across the nation.

In the Spring of 2001 our Foundation will convene an invited group of 30, composed of the leading physicians in integrative medicine and the leading philanthropists committed to changing the paradigm in medicine. Our gathering, entitled “Consilience and Commitment: Advancing Integrative Medicine,” has the potential to foster collaboration and leverage change for transforming healthcare in our society.

In nearly every case we are backing “the people” as Dr. Mandela has suggested. Those people, — Dr. Gregory Plotnikoff at the University of Minnesota, Louis King at Summit Academy, Murisiku Raifu, a young Minnesota medical student from Ghana, the Reverend Joan Dezhad at Abraham Lincoln High School, Dr. Mimi Guarneri at Scripps, Dr. James Gordon of the Center for Mind-Body Medicine, Linda Flies Carole at Abbott-Northwestern Hospital, Steve Rothchild, to name a few— all have the power and the commitment to change the world. We are proud to list herein the George Family Foundation partners for change.

Sincerely,

Penny George
President

OUR INTERESTS

Integrated Healing

Programs and initiatives that promote an integrated approach to healing mind, body, heart and spirit.

Educational Opportunity

Fellowships for individuals with potential to positively impact society and to gain a deeper understanding of the world and its diverse cultures.

Youth Development

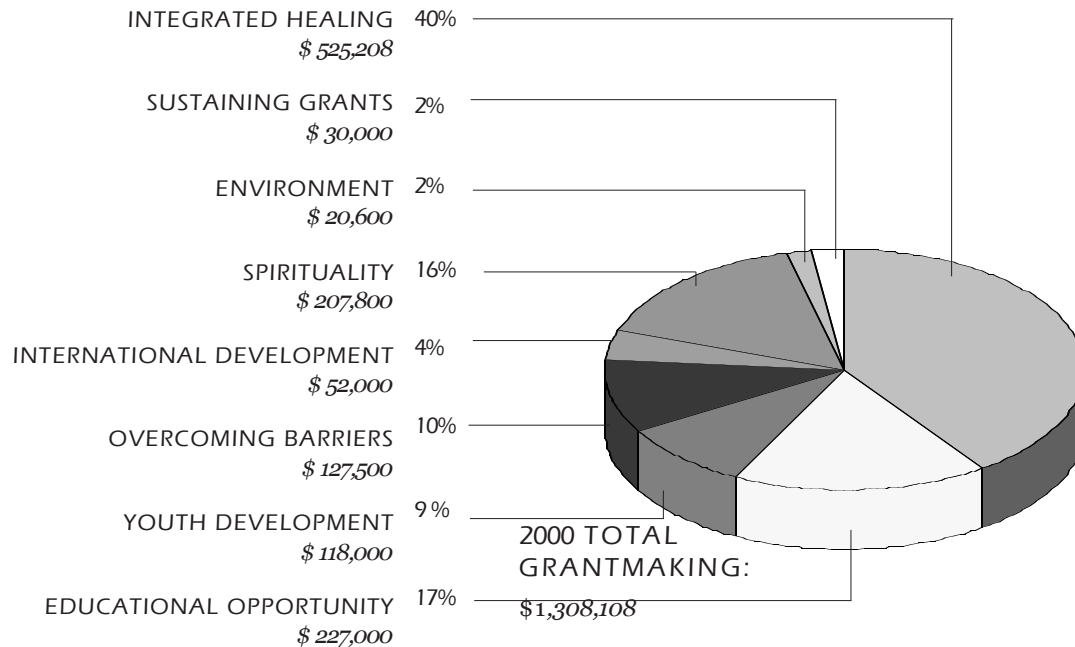
Programs focused on leadership development and mentoring.

Overcoming Barriers

Programs that help women and people of color overcome societal barriers and realize their full potential.

Spirituality

Programs which enrich the spiritual lives of individuals, families and communities.



INTEGRATED HEALING

Abbott Northwestern Hospital <i>In support of the William E. Petersen Annual Lectureship.</i>	\$2,500
Center for Mind-Body Medicine <i>In partial fulfillment of a \$100,000 pledge in support of a training program for integrative care counselors serving people living with cancer: Cancer Guides. Dr. James Gordon, Director.</i>	\$50,000
Center for Spirituality and Healing <i>In partial fulfillment of a \$161,300 pledge in support of "Integrative Medicine Curriculum Development: an Investment in Health Care Transformation", at the University of Minnesota. Dr. Greg Plotnikoff, Director.</i>	\$105,300
Health Frontiers <i>In support of the installation of a mind-body kiosk at Minneapolis Children's Medical Center, to teach children and parents the power of the mind to influence healing. Dr. Karen Olness, Director</i>	\$26,500
Minneapolis Heart Institute Foundation <i>In support of the Duke University Mantra II study to determine whether intercessory prayer influences the medical outcomes of invasive cardiovascular treatment. Dr. Mitchell Krucoff, Director.</i>	\$25,000
Minneapolis Heart Institute Foundation <i>Fulfillment of original \$96,760 pledge and partial fulfillment of a \$136,216 pledge in support of "Healing the Heart: Cardiovascular Health Services", integrated health care model for cardiovascular services at Abbott-Northwestern Hospital and the new Heart Hospital. Linda Flies Carole, Ph.D., Director.</i>	\$82,976
The Morton Cure Paralysis Fund <i>In support of the Fund's Paralysis Research activities (in honor of Ben Peyton).</i>	\$ 1,000
The National Foundation for Alternative Medicine <i>In support of the Best Case Series which evaluates methods and outcomes of effective alternative medical treatments from around the world.</i>	\$15,000
Pathways <i>In support of this health crisis resource center's efforts to support a creative healing response to life-threatening illness.</i>	\$10,000

INTEGRATED HEALING CONTINUED

Research Centre for Alternative Medicine	\$25,000
<i>In support of RCAM's expansion of their capacity to continue research projects in energy medicine. Dr. Badri Rickhi, Director.</i>	
Scripps Center for Integrative Medicine	\$50,000
<i>In partial fulfillment of a \$100,000 pledge in support of Scripps' efforts at comprehensive planning for development of a financially feasible model for integrative medicine. Dr. Ermina Guarneri, Director.</i>	
The Santa Fe Forum	\$5,000
<i>In support of the Forum's efforts to bring a massage therapist to the Pueblo village of Santa Clara.</i>	
Stuart Pimsler Dance Theater	\$5,000
<i>In support of Pimsler's Out of This World/The Life After Life Project that focuses on caregivers' personal experiences and beliefs about death, dying and the afterlife.</i>	
Susan Deborah King – "One-Breasted Woman" Project	\$10,000
<i>In partial fulfillment of a \$40,000 pledge in support of the creation of a book of poetry for survivors of breast cancer.</i>	
University of Chicago	\$10,000
<i>In support of a doctoral study on integrative treatments for low income women with breast cancer.</i>	
Virginia Piper Cancer Institute	\$101,932
<i>In support of Healing Coach position for Virginia Piper Cancer Institute, to help patients create individualized healing programs addressing the needs of mind, body, heart and spirit.</i>	
TOTAL INTEGRATED HEALING	\$ 525,208

EDUCATIONAL OPPORTUNITY

The George Fellows Program	
<i>The purpose of the George Fellows Program is to encourage highly qualified and promising students as they pursue advanced degrees. Preference is given to students who demonstrate financial need, minority students, and students with exceptional academic potential. The majority of these fellowships go to international students from developing countries, as the Foundation is interested in supporting international students and the perspective they bring to our academic communities.</i>	
Amherst College	\$15,000
<i>In partial fulfillment of a \$150,000 pledge - George International Fellows.</i>	
Carleton College	\$15,000
<i>In partial fulfillment of a \$150,000 pledge - George International Fellows.</i>	
Georgia Institute of Technology	\$30,000
<i>In partial fulfillment of a \$300,000 pledge - George Fellowship Program in Bioengineering and Bioscience and Industrial Engineering.</i>	
Hamm Clinic	\$20,000
<i>In partial fulfillment of a \$50,000 pledge - George Fellowship Program.</i>	
Harvard Business School	\$30,000
<i>In partial fulfillment of a \$280,000 pledge - George International Fellows.</i>	
Macalester College	\$15,000
<i>In partial fulfillment of a \$145,000 pledge - George International Fellows.</i>	
University of St. Thomas	\$10,000
<i>In partial fulfillment of a \$30,000 pledge - George Fellowship Program.</i>	
Total George Fellows Program	\$135,000

EDUCATIONAL OPPORTUNITY

The Institute for New Americans	\$50,000
<i>In support of the Lincoln English Language School and Abraham Lincoln High School of Minneapolis that provide services to young immigrants.</i>	
The Minneapolis Institute of Arts	\$ 10,000
<i>In support of the George Educational Fund for MIA's artistic education and outreach programs.</i>	
Minnesota Humanities Commission	\$20,000
<i>In support of the Minnesota Core Knowledge Center serving the Midwest, ensuring that the humanities remain part of public school curriculum.</i>	
Redeemer Missionary Baptist Church	\$ 12,000
<i>In support of the Redeemer Scholarship Fund for an African medical student at the University of Minnesota.</i>	
<u>Total Educational Opportunities</u>	<u>\$92,000</u>
<u>GRAND TOTAL EDUCATION & EDUCATIONAL OPPORTUNITIES</u>	<u>\$ 227,000</u>

YOUTH DEVELOPMENT

Compass Institute	\$ 1,000
<i>In support of Twin Cities Peace Jam that builds youth leadership through engagement with Nobel Prize Laureates.</i>	
Minnesota Thunder Youth Development Organization	\$ 10,000
<i>In support of soccer and education programs that work with inner-city neighborhood youth centers.</i>	
Sigma Chi Foundation	\$25,000
<i>In partial fulfillment of a \$100,000 pledge for the Horizons Leadership Program.</i>	
Summit Academy OIC	\$75,000
<i>In partial fulfillment of a \$150,000 pledge for YouthBuild, a program for at-risk inner-city youth.</i>	
Youth Trust	\$2,000
<i>In support of Youth Trust's programs that link resources to help youth develop marketable skills.</i>	
The Youth Foundation	\$5,000
<i>In support of programs that provide resources and educational opportunities to the underserved youth of Lake and Eagle counties in Colorado.</i>	
<u>TOTAL YOUTH DEVELOPMENT</u>	<u>\$ 118,000</u>

OVERCOMING BARRIERS

Harriet Tubman Center <i>In partial fulfillment of a \$20,000 pledge in support of a Spirituality, Health and Healing initiative.</i>	\$ 10,000
The Jeremiah Program <i>In support of Jeremiah's programs for single mothers to promote self-sufficiency and educational advancement.</i>	\$ 10,000
The Loft Literary Center <i>In support of youth programming that promotes family literacy, cultural tolerance and academic skills.</i>	\$5,000
Planned Parenthood of Minnesota/South Dakota <i>In partial fulfillment of a \$15,000 pledge for general operating support.</i>	\$5,000
Sabathani Community Center <i>In support of Sabathani's services to the Central Neighborhood's youth and families.</i>	\$5,000
Twin Cities RISE! <i>In partial fulfillment of a \$100,000 pledge in support of scholarships for participants in TCR's skills training and job acquisition programming.</i>	\$50,000
W.A.T.C.H. <i>Toward a \$45,000 pledge to support initiatives to improve the criminal justice system's handling of domestic violence and sexual assault cases.</i>	\$ 15,000
Women's Opportunity Fund <i>In support of WOF's efforts to provide micro-lending opportunities for women in poverty to transform their lives. Serves 19 countries worldwide.</i>	\$5,000
WomenVenture <i>In support of their Intergenerational Program providing a support system for mothers and daughters.</i>	\$7,500
YWCA of Minneapolis <i>In partial fulfillment of a \$20,000 pledge in support of Women's Wellness Program, helping low-income women of color develop and implement wellness plans.</i>	\$ 10,000

OVERCOMING BARRIERS CONTINUED

YWCA of Minneapolis <i>In partial fulfillment of a \$25,000 pledge in support of YWCA's Community and Urban Sports Center serving inner-city youth.</i>	\$5,000
TOTAL OVERCOMING BARRIERS	\$ 127,500

ENVIRONMENT

Audubon Center of the North Woods <i>Scholarship support for students to attend summer environmental education camps.</i>	\$ 10,600
Eagle Valley Land Trust <i>General operating support for this Colorado land conservation organization.</i>	\$5,000
The Jane Goodall Institute <i>In support of Roots and Shoots, a global environmental and humanitarian education program.</i>	\$5,000
TOTAL ENVIRONMENT	\$ 20,600

INTERNATIONAL DEVELOPMENT

CARE	\$5,000
<i>To support CARE's international relief and development efforts.</i>	
Children's HeartLink	\$5,000
<i>In partial fulfillment of a \$15,000 pledge supporting work to build medical capacity for children with heart problems in developing countries.</i>	
The Godchild Project	\$10,000
<i>In support of this project that provides care to impoverished children, families and communities in Guatemala.</i>	
Minnesota International Center	\$6,000
<i>General operating support.</i>	
The Nelson Mandela Foundation	\$25,000
<i>In support of Nelson Mandela's efforts in reconciliation for international peace.</i>	
Students International Health Committee	\$1,000
<i>Honorarium for Global Health Forum Conference Speaker.</i>	
TOTAL INTERNATIONAL	\$ 52,000

SPIRITUALITY

Dalai Lama Tibetan Community Center Fund	\$25,000
<i>In partial fulfillment of a \$50,000 pledge to create a Tibetan Community Center in Minnesota in conjunction with the visit of His Holiness, the Dalai Lama.</i>	
The David Institute for Spiritual and Leadership Development	\$10,000
<i>In partial fulfillment of a \$30,000 pledge for an initiative that teaches inner-city non-profit leaders self-renewal practices to help them avoid burnout.</i>	
Episcopal Community Services	\$10,000
<i>In support of ECS's services for Minnesota families and youth.</i>	

SPIRITUALITY CONTINUED

Faith Communities Project	\$10,000
<i>In support of programming that builds the capacity of pastors and church leaders to minister effectively in the inner-city.</i>	
Episcopal House of Prayer	\$2,500
<i>In support of this ecumenical contemplative retreat center.</i>	
Greater Minneapolis Council of Churches	\$5,000
<i>In partial fulfillment of a \$10,000 pledge for GMCC's Discover Learning Centers that provide tutoring within inner-city congregations.</i>	
Minnesota Public Radio	\$20,000
<i>In support of national programming entitled "A Common Place: Conversations Around the Spiritual Geography of Life".</i>	
Plymouth Congregational Church	\$17,000
<i>In partial fulfillment of a \$51,000 pledge in support of a community outreach worker.</i>	
Redeemer Missionary Baptist Church	\$25,000
<i>In partial fulfillment of a \$50,000 pledge in support of the Quantum Opportunities Program enhancing spiritual and personal development and academic achievement for members of the congregation and community.</i>	
Redeemer Restoration Project	\$50,000
<i>In support of the capital restoration project at this architecturally significant inner-city church serving the Lyndale and Central neighborhoods.</i>	
United Theological Seminary	\$33,300
<i>In partial fulfillment of a \$100,000 pledge to promote programs in spiritual development.</i>	
TOTAL SPIRITUALITY	\$ 207,800

SUSTAINING GRANTS

The Bakken Library and Museum	\$2,500
<i>In support of this center for education about the role of electricity and magnetism in the life sciences and medicine.</i>	
The Guthrie Theater	\$5,000
<i>In support of the Guthrie's 2000 Annual Fund.</i>	
The Loft Literary Center	\$10,000
<i>In support of Open Book's Capital Campaign for their new Minneapolis facility.</i>	
Minnesota Orchestral Association	\$1,000
<i>In support of the Orchestra's 1999-2000 season.</i>	
National Charities Information Bureau	\$1,500
<i>In support of NCIB's nationwide network that helps donors become informed contributors.</i>	
Page Education Foundation	\$5,000
<i>In support of this organization that provides scholarships to students of color who attend post-secondary institutions within Minnesota.</i>	
Plymouth Music Series	\$2,500
<i>Sustaining grant for choral arts programming.</i>	
The Saint Paul Chamber Orchestra	\$2,500
<i>In partial fulfillment of \$7,500 pledge in support of their CONNECT Education Program in partnership with Twin Cities' public schools.</i>	
TOTAL SUSTAINING GRANTS	\$30,000

Total Grants Paid 2000 \$1,308,108

FINANCIAL SUMMARY

STATEMENT OF HOLDINGS December 31, 2000 and 1999

	MARKET		COST	
	2000	1999	2000	1999
A S S E T S :				
Investments:				
Stocks	\$26,088,933	\$22,387,265	\$17,004,429	\$9,578,279
Cash and Cash Equivalents	2,434,963	56	2,434,963	56
Total Investments	\$28,523,896	\$22,387,321	\$19,439,392	\$9,578,335
Principal arising from cash transactions			<u>\$19,439,392</u>	<u>\$9,578,335</u>

STATEMENT OF RECEIPTS AND DISBURSEMENTS * Years ended December 31, 2000 and 1999

	2000	1999
R E C E I P T S :		
Dividends	\$132,564	\$93,876
Interest	\$12,609	\$2,143
Net gain on disposition of investments	\$9,908,948	\$2,696,852
Contributions	<u>\$1,643,790</u>	<u>\$382,530</u>
Total Receipts	\$11,697,911	\$3,175,401
D I S B U R S E M E N T S :		
Excise tax on net investment income	\$121,505	\$141,645
General and administrative expenses	\$88,292	\$23,101
Management fees and related expenses	\$205,319	\$194,648
Charitable contributions	<u>\$1,308,108</u>	<u>\$895,350</u>
Total Disbursements	\$1,723,224	\$1,254,744
Net increase in principal for the year	\$9,974,687	\$1,920,657
Adjustment to principal	\$(113,630)	\$(2,639)
Principal at beginning of year	<u>\$9,578,335</u>	<u>\$7,660,317</u>
Principal at end of year	\$19,439,392	\$9,578,335

* Preliminary Data

HOW TO APPLY TO THE GEORGE FAMILY FOUNDATION

Applicants are encouraged to submit a letter of inquiry or to discuss their request with staff before submitting an application.

One Copy of the proposal should be submitted which includes the following:

- Complete George Family Foundation Grant Application Cover Page.
- Brief description of mission, history, background and capabilities of organization.
- Purpose of project or program: *What will be accomplished?*
- Statement of need: *What problems will be addressed and solved?*
- Relevance: *How does the project relate to the interests of the Foundation?*
- Implementation: *How will the project be carried out? Workplan? Timelines?*
- Collaboration: *How will the applicant work with others? What are major sources of support?*
- Future Funding: *How will the program be sustained in the future?*
- Staff: *What are the capabilities of those responsible for the project?*
- Evaluation Plan: *How will results be evaluated?*
- George Family Foundation Support: *How will this grant be used?*

Please attach the following additional information:

- Copy of Treasury letter certifying your 501(c)(3) tax-exempt status.
- Copy of organization's budget for current fiscal year.
- Copy of latest audit of financial statement.
- Listing of Board of Directors and affiliations.
- Listing of current funders.

Proposals should be received by May 30 or October 30

1818 Oliver Avenue South
Minneapolis, Minnesota 55405
612 377-8400 *phone*
612 377-8407 *fax*

Penny Pilgram George

President

William W. George

Vice President

Jeffrey Pilgram George

Trustee

Jonathan Roulette George

Trustee

Diane B. Neimann

Executive Director

The George Family Foundation

1818 Oliver Avenue South
Minneapolis, Minnesota 55405

612 377-8400 phone

612 377-8407 fax

www.fpadvisors.com

general@fpadvisors.com

© COPYRIGHT 2001



We are grateful

*to be in a position to share with others
some of what we have been given,
and committed to growing
individually and collectively
through the activities of
the foundation.*