values
ethics
character

building
communities

sharing the
blessings

making a
difference

working
collaboratively

ANNUAL REPORT 2000
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.
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, D U H 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 "Conscience 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, Murisi Ku Reifu, a young Minnesota medical student from Ghana, the Reverend John Deshad at Abraham Lincoln High School, Dr. Mimi Guarneri at Scripps, Dr. James Gordon of the Center for Mind-Body Medicine, Linda Fles Carole at Abbotts-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

<table>
<thead>
<tr>
<th>Program</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbott Northwestern Hospital</td>
<td>$2,500</td>
</tr>
<tr>
<td>Center for Mind-Body Medicine</td>
<td>$50,000</td>
</tr>
<tr>
<td>Center for Spirituality and Healing</td>
<td>$105,300</td>
</tr>
<tr>
<td>Health Frontiers</td>
<td>$26,500</td>
</tr>
<tr>
<td>Minneapolis Heart Institute Foundation</td>
<td>$25,000</td>
</tr>
<tr>
<td>The Morton Cure Paralysis Fund</td>
<td>$1,000</td>
</tr>
<tr>
<td>The National Foundation for Alternative Medicine</td>
<td>$15,000</td>
</tr>
<tr>
<td>Pathways</td>
<td>$10,000</td>
</tr>
</tbody>
</table>

### GRANTMAKING:

- **Integrated Healing**: $525,208 (40%)
- **Sustaining Grants**: $30,000 (2%)
- **Environment**: $20,600 (2%)
- **Spirituality**: $207,800 (16%)
- **International Development**: $52,000 (4%)
- **Overcoming Barriers**: $127,500 (10%)
- **Youth Development**: $118,000 (9%)
- **Educational Opportunity**: $227,000 (17%)

Total GRANTMAKING: $1,308,108
Research Centre for Alternative Medicine $25,000
In support of RCAM’s expansion of their capacity to continue research projects in energy medicine.
Dr. Badri Rickhi, Director.

Scripps Center for Integrative Medicine $50,000
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.

The Santa Fe Forum $5,000
In support of the Forum’s efforts to bring a massage therapist to the Pueblo village of Santa Clara.

Stuart Pimsler Dance Theater $5,000
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.

Susan Deborah King – “One-Breasted Woman” Project $10,000
In partial fulfillment of a $40,000 pledge in support of the creation of a book of poetry for survivors of breast cancer.

University of Chicago $10,000
In support of a doctoral study on integrative treatments for low income women with breast cancer.

Virginia Piper Cancer Institute $101,932
In support of a Heining Coach position for Virginia Piper Cancer Institute, to help patients create individualized healing programs addressing the needs of mind, body, heart and spirit.

TOTAL INTEGRATED HEALING $ 525,208

The George Fellows Program
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.

Amherst College $15,000
In partial fulfillment of a $150,000 pledge - George International Fellows.

Carleton College $15,000
In partial fulfillment of a $150,000 pledge - George International Fellows.

Georgia Institute of Technology $30,000
In partial fulfillment of a $300,000 pledge - George Fellowship Program in Bioengineering and Bioscience and Industrial Engineering.

Hamm Clinic $20,000
In partial fulfillment of a $30,000 pledge - George Fellowship Program.

Harvard Business School $30,000
In partial fulfillment of a $280,000 pledge - George International Fellows.

Macalester College $15,000
In partial fulfillment of a $145,000 pledge - George International Fellows.

University of St. Thomas $10,000
In partial fulfillment of a $30,000 pledge - George Fellowship Program.

Total George Fellows Program $135,000
## Educational Opportunity

<table>
<thead>
<tr>
<th>Organization</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Institute for New Americans</td>
<td>$50,000</td>
<td>In support of the Lincoln English Language School and Abraham Lincoln High School of Minneapolis that provide services to young immigrants.</td>
</tr>
<tr>
<td>The Minneapolis Institute of Arts</td>
<td>$10,000</td>
<td>In support of the George Educational Fund for MIA’s artistic education and outreach programs.</td>
</tr>
<tr>
<td>Minnesota Humanities Commission</td>
<td>$20,000</td>
<td>In support of the Minnesota Core Knowledge Center serving the Midwest, ensuring that the humanities remain part of public school curriculum.</td>
</tr>
<tr>
<td>Redeemer Missionary Baptist Church</td>
<td>$12,000</td>
<td>In support of the Redeemer Scholarship Fund for an African medical student at the University of Minnesota.</td>
</tr>
<tr>
<td>Total Educational Opportunities</td>
<td>$92,000</td>
<td></td>
</tr>
</tbody>
</table>

**Grand Total Education & Educational Opportunities** $227,000

## Youth Development

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

**Total Youth Development** $118,000
Harriet Tubman Center $10,000
In partial fulfillment of a $20,000 pledge in support of a Spirituality, Health and Healing initiative.

The Jeremiah Program $10,000
In support of Jeremiah’s programs for single mothers to promote self-sufficiency and educational advancement.

The Loft Literary Center $5,000
In support of youth programming that promotes family literacy, cultural tolerance and academic skills.

Planned Parenthood of Minnesota/South Dakota $5,000
In partial fulfillment of a $15,000 pledge for general operating support.

Sabathani Community Center $5,000
In support of Sabathani’s services to the Central Neighborhood’s youth and families.

Twin Cities RISE! $50,000
In partial fulfillment of a $100,000 pledge in support of scholarships for participants in TCR’s skills training and job acquisition programming.

W.A.T.C.H. $15,000
Toward a $45,000 pledge to support initiatives to improve the criminal justice system’s handling of domestic violence and sexual assault cases.

Women’s Opportunity Fund $5,000
In support of WOF's efforts to provide micro-lending opportunities for women in poverty to transform their lives. Serves 19 countries worldwide.

WomenVenture $7,500
In support of their Intergenerational Program providing a support system for mothers and daughters.

YWCA of Minneapolis $10,000
In partial fulfillment of a $25,000 pledge in support of YWCA’s Community and Urban Sports Center serving inner-city youth.

TOTAL OVERCOMING BARRIERS $127,500

Audubon Center of the North Woods $10,600
Scholarship support for students to attend summer environmental education camps.

Eagle Valley Land Trust $5,000
General operating support for this Colorado land conservation organization.

The Jane Goodall Institute $5,000
In support of Roots and Shoots, a global environmental and humanitarian education program.

TOTAL ENVIRONMENT $20,600
INTERNATIONAL DEVELOPMENT

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

SPIRITUALITY

Dalai Lama Tibetan Community Center Fund $25,000 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.
The David Institute for Spiritual and Leadership Development $10,000 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.
Episcopal Community Services $10,000 In support of ECS’s services for Minnesota families and youth.

TOTAL SPIRITUALITY $207,800

SPIRITUALITY CONTINUED

Faith Communities Project $10,000 In support of programming that builds the capacity of pastors and church leaders to minister effectively in the inner-city.
Episcopal House of Prayer $2,500 In support of this ecumenical contemplative retreat center.
Greater Minneapolis Council of Churches $5,000 In partial fulfillment of a $10,000 pledge for GMCC’s Discover Learning Centers that provide tutoring within inner-city congregations.
Minnesota Public Radio $20,000 In support of national programming entitled “A Common Place: Conversations Around the Spiritual Geography of Life”.
Plymouth Congregational Church $17,000 In partial fulfillment of a $31,000 pledge in support of a community outreach worker.
Redeemer Missionary Baptist Church $25,000 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.
Redeemer Restoration Project $50,000 In support of the capital restoration project at this architecturally significant inner-city church serving the Lyndale and Central neighborhoods.
United Theological Seminary $33,300 In partial fulfillment of a $100,000 pledge to promote programs in spiritual development.
TOTAL SPIRITUALITY $207,800
**SUSTAINING GRANTS**

The Bakken Library and Museum $2,500
In support of this center for education about the role of electricity and magnetism in the life sciences and medicine.

The Guthrie Theater $5,000
In support of the Guthrie’s 2000 Annual Fund.

The Loft Literary Center $10,000
In support of Open Book’s Capital Campaign for their new Minneapolis facility.

Minnesota Orchestral Association $1,000
In support of the Orchestra’s 1999-2000 season.

National Charities Information Bureau $1,500
In support of NCIB’s nationwide network that helps donors become informed contributors.

Page Education Foundation $5,000
In support of this organization that provides scholarships to students of color who attend post-secondary institutions within Minnesota.

Plymouth Music Series $2,500
Sustaining grant for choral arts programming.

The Saint Paul Chamber Orchestra $2,500
In partial fulfillment of $7,500 pledge in support of their CONNECT Education Program in partnership with Twin Cities’ public schools.

TOTAL SUSTAINING GRANTS $30,000

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**FINANCIAL SUMMARY**

**STATEMENT OF HOLDINGS**

*December 31, 2000 and 1999*

<table>
<thead>
<tr>
<th>MARKET</th>
<th>COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>1999</td>
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<tr>
<td>2000</td>
<td>1999</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>ASSETS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investments:</td>
</tr>
<tr>
<td>Stocks</td>
</tr>
<tr>
<td>Cash and Cash Equivalents</td>
</tr>
<tr>
<td>Total Investments</td>
</tr>
<tr>
<td>Principal arising from cash transactions</td>
</tr>
</tbody>
</table>

**STATEMENT OF RECEIPTS AND DISBURSEMENTS**

*Years ended December 31, 2000 and 1999*

<table>
<thead>
<tr>
<th>RECEIPTS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dividends</td>
</tr>
<tr>
<td>Interest</td>
</tr>
<tr>
<td>Net gain on disposition of investments</td>
</tr>
<tr>
<td>Contributions</td>
</tr>
<tr>
<td>Total Receipts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DISBURSEMENTS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excise tax on net investment income</td>
</tr>
<tr>
<td>General and administrative expenses</td>
</tr>
<tr>
<td>Management fees and related expenses</td>
</tr>
<tr>
<td>Charitable contributions</td>
</tr>
<tr>
<td>Total Disbursements</td>
</tr>
<tr>
<td>Net increase in principal for the year</td>
</tr>
<tr>
<td>Adjustment to principal</td>
</tr>
<tr>
<td>Principal at beginning of year</td>
</tr>
<tr>
<td>Principal at end of year</td>
</tr>
</tbody>
</table>

* Preliminary Data

**Total Grants Paid 2000**

$1,308,108
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
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.