



The
George
Foundation
Est. 1945

Grantmaking Strategic Plan

2025-2030

Together. Building a Thriving Fort Bend.

ORGANIZATIONAL BACKGROUND



Established in 1945 through the visionary leadership of Mr. Albert P. and Mrs. Mamie George, The Foundation continues to honor the George's legacy of making Fort Bend County a better place each day—without fanfare and always in partnership with local stakeholders. Mamie's ancestors were among Stephen F. Austin's "Old Three Hundred," and through hard work and perseverance, the family built a successful farming and ranching operation along the Brazos River. When Albert and Mamie faced immeasurable personal loss, they chose not to retreat but instead dedicated their efforts to creating opportunities for other families in Fort Bend County (FBC), the community they loved. Their contributions laid the foundation for a healthy, vibrant, and neighborly community that continues to thrive today.

Looking Ahead to 2025-2030 -As we move into 2025 and beyond, the Foundation remains steadfast in fulfilling its mission. While no longer led by members of the George family, our Trustees and Staff continue to uphold Albert and Mamie's ethos: "Always do good, because it is the right thing to do." A five-member Board of Trustees, composed of highly engaged community leaders, provides strategic vision and oversight to ensure the continued success of our initiatives. Additionally, our staff of twenty-five diligently manages the Foundation's grantmaking, administrative operations, and the stewardship of our extensive land holdings—including the historic George family homestead.

Following a comprehensive reappraisal of land assets in 2023, the Foundation's total assets are projected to exceed \$700 million by 2030, reflecting the continued economic growth and increasing land values in the Fort Bend County region. This represents a significant expansion from our 2023 valuation and underscores our ability to enhance our impact through strategic investments and philanthropic giving.



MISSION, VISION, PHILOSOPHY

VISION



A thriving nonprofit sector that addresses critical community needs, enhances the quality of life and provides opportunities for Fort Bend County residents.

MISSION



To partner with the community to leverage the Foundation's resources to positively impact Fort Bend County and its residents.



PHILOSOPHY



To focus on our mission and strive toward our vision, we subscribe to the following philosophy statement. The George Foundation believes that Fort Bend County is a generous and compassionate community, at the nexus of a rich history and an aspirational future. We believe that when people are offered opportunities to reach their peak potential, a stronger and more vibrant community emerges for all. Our work is grounded in the following tenets:

- We understand our community's challenges are complex and will require collaborative solutions.
- We work to ensure the well-being of all Fort Bend County children and families.
- We strive to improve access to critical health, education, social services, and affordable housing.
- We encourage a comprehensive approach to serve those with complex needs.
- We invest in transformational opportunities through innovations born from local stakeholder input.
- We prioritize affordable housing, through direct investment and collaboration.
- We seek to support and leverage the diverse community that is Fort Bend County.
- We recognize nonprofits as critical to the well-being of our community and support their development, particularly by investing in human capital and leadership.
- We aim to deliver impact and continuous improvement through data and learning.
- We promote philanthropy in all stages of life and encourage others to join in this endeavor.

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PLANNING CONSIDERATIONS

In 2024, Trustees and Staff engaged in a comprehensive review of grants and community data, analyzed internal and external factors, and identified emerging needs through a Community Needs Assessment. This process led to an updated strategic plan for 2025-2030, reaffirming the Foundation's core commitments, highlighting community assets, directing increased investments into critical needs, and positioning the Foundation for sustained impact as we journey toward our 80th year.

The 2025-2030 strategic plan was developed with a particular emphasis on the following key factors:

- **An updated understanding of the community's needs, particularly within the context of a rapidly growing, highly diverse county.**
- **The deliberate incorporation of stakeholder input into the planning process to ensure alignment with local priorities.**
- **A thorough analysis of our current impact and opportunities for greater, more sustainable outcomes.**

Beyond Grantmaking: A Strategic Approach to Maximizing Impact

Rather than simply increasing funding within our existing programming framework and relationships, Trustees and Staff critically evaluated how we can:

- Expand beyond traditional grantmaking to support innovative solutions that address emerging and long-term challenges.
- Maximize our unique position as a grantmaker by expanding special programs and playing a more active role as a convener and capacity builder.
- Foster collaborative solutions to tackle complex community challenges through strategic partnerships.
- Leverage resources beyond funding to create greater impact—including utilizing our influence to drive meaningful change on critical issues.
- With this forward-looking strategy, the Foundation is well-positioned to deepen its impact and ensure that FBC thrives for generations to come.

PLANNING CONSIDERATIONS, CONT.

With this forward-looking strategy, the Foundation is well-positioned to deepen its impact and ensure that FBC thrives for generations to come.

Building on the success of the 2019-2024 strategic plan, which effectively advanced the Foundation's mission, the new strategic plan seeks to expand and enhance these efforts while introducing innovative solutions to address the community's most pressing challenges.

Following a comprehensive reappraisal of land assets in 2028, the Foundation's total assets are projected to approach \$700 million by 2030, reflecting the continued economic growth and increasing land values in the FBC region. This represents a significant expansion from our 2023 valuation and underscores our ability to enhance our impact through strategic investments and philanthropic giving.

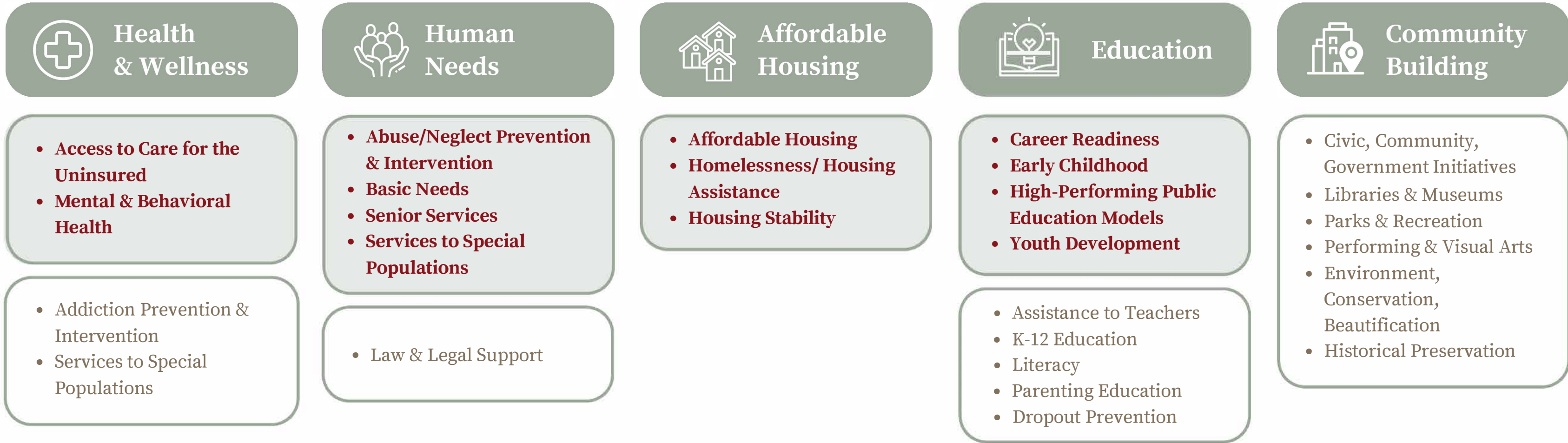
During the planning and needs assessment process, Trustees identified key priorities, including:

- Strengthening Fort Bend County families to ensure long-term stability and well-being.
- Encouraging collaboration among organizations to better serve complex needs.
- Improving access to care through innovative service models.
- Engaging Fort Bend County's diverse communities to foster inclusivity and shared progress.
- A significant addition to this strategic vision is the new grantmaking pillar: Affordable Housing, reflecting the Foundation's commitment to addressing a critical community need.

Trustees also emphasized the importance of leveraging the Foundation's full range of resources—including grants, special programs, land assets, influence, convening power, and collaborative partnerships—to amplify impact.

The George Foundation Grantmaking Framework

Grantmaking Pillars



*Red Bold indicates priority funding areas

Special Programs & Capacity Building

Youth In Philanthropy

Scholarships

Excellence in Nonprofit Leadership

Collaborative Initiatives

Key Themes

- Allocate 80% of funds to priority funding areas
- Maintain responsive grantmaking
- Consider requests for community building projects
- Proactively support collaborative initiatives to address community needs
- Prioritize systemic impact in education over individual/classroom initiatives

THEMES & GOALS SUMMARY FOR PRIORITY FUNDING AREAS



HEALTH AND WELLNESS: Foster healthier families in FBC by enhancing access to care, addressing systemic barriers, supporting preventive measures, and increasing access to health resources.



HUMAN NEEDS: Increase the percentage of FBC families that are “thriving” from [#%] to [#%].
[Percent of Thriving Families goal to be set upon selection of criteria and completed assessment]



EDUCATION: Partner with districts and education providers to improve student outcomes in key success metrics.



AFFORDABLE HOUSING: Deliver 300 affordable housing units, completing at least 200 by Year 5, through direct investment and collaboration.



SPECIAL PROGRAMS & CAPACITY BUILDING: Expand the Excellence in Nonprofit Leadership (ENL) initiative to strengthen grantee effectiveness and leadership capacity, while increasing opportunities for students to develop philanthropy and leadership skills in FBC.

THEME: HEALTH AND WELLNESS



GOAL: Foster healthier families in Fort Bend County by enhancing access to care, addressing systemic barriers, supporting preventive measures, and increasing health resources.



KEY ACTIONS



- ☐ Resource mental and health services to vulnerable populations (uninsured, underinsured, senior services) to improve overall wellness.
- ☐ Partner with local organizations to deliver preventative services—including health screenings, immunizations, and wellness education—to at least 15 underserved communities, including those facing economic, geographic, cultural, linguistic, and accessibility barriers to healthcare.
- ☐ Monitor and measure impact using data on health outcomes and healthcare utilization rates from the Kinder Institute's Health Survey.
- ☐ Collaborate with nonprofits to address barriers to accessing prenatal care for vulnerable women in FBC, aiming to reduce delayed prenatal care rates by at least 20% - based on community health assessment data and surveys.

THEME: HUMAN NEEDS



GOAL: Increase the percentage of Fort Bend County families that are “thriving” from [#%] to [#%].
[Percent of "thriving" families goal to be set upon selection of criteria and completed assessment]



KEY ACTIONS



- ☐ By December 2027, establish a community predictive Human Needs Assessment index to measure impact and improvements for people and families in FBC.
- ☐ By 2028, set a growth target for 2030, based on assessment findings, aiming to increase the percentage of thriving families through investing in priority strategies and actions.
- ☐ Invest in strategies and activities specifically addressing food and housing security, workforce capabilities, and special populations.

THEME: EDUCATION



GOAL: Partner with districts and education providers to improve student outcomes in key success metrics.

KEY ACTIONS

- ☐ Prior to the start of the academic year 2026-2027, determine and define targets for 2–3 key student success metrics to measure and invest in through collaboration with key stakeholders.
- ☐ Fund partnerships across ISDs, nonprofits, preschools, early education centers, and higher education institutes to address and build programming and services that impact key student success metrics.
- ☐ Invest in education models focused on system-wide initiatives that improve key metrics.

THEME: AFFORDABLE HOUSING



GOAL: Deliver 300 affordable housing units, completing at least 200 by Year 5, through direct investment and collaboration.



KEY ACTIONS



- ☐ Bring together the government and the community to support affordable housing in FBC.
- ☐ Partner with experienced developers to deliver diverse housing solutions.
- ☐ Integrate affordable housing into The Foundation property master plan.
- ☐ Partner with local organizations and financial institutions to create financial education programs focused on budgeting, saving, and credit-building, ensuring potential buyers and renters can qualify for affordable housing options.
- ☐ Continue to support the development of the LINC platform to empower the non-owner population to navigate housing programs and funding opportunities effectively.

THEME: SPECIAL PROGRAMS & CAPACITY BUILDING



GOAL:

Expand the Excellence in Nonprofit Leadership (ENL) initiative to strengthen grantee effectiveness and leadership capacity, while increasing opportunities for Youth in Philanthropy (YIP) students to develop philanthropy and leadership skills in Fort Bend County.



KEY ACTIONS



- ☐ Expand partnerships to support programs.
- ☐ Launch pilot onsite YIP program at 3 high school campuses seeking to enroll at least [#] students per campus.
- ☐ Engage [#] new nonprofit leaders through ENL and other professional development opportunities.



APPENDIX

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|-----|---|-----|-----------------------------------|
| »»» | High-Performing Public Education Model | »»» | Proposed Distribution Allocations |
| »»» | Grantmaking Strategy Screen | »»» | 5 Year Required Distributions |
| »»» | 2024 Kinder Institute Community Needs Assessment Summary Report | »»» | Communications Plan |
| | | »»» | ALICE in Fort Bend County |

HIGH-PERFORMING PUBLIC EDUCATION MODEL

While there is not a uniform definition for a 'high performing K-12 public education model', there is consistency across a body of research that points to key conditions that foster high performance in public schools. In a Texas Education Agency (TEA) study (2024) of high-performing charter schools in Texas that also looked at the current literature on best practices in K–12 charter school and non-charter school campuses, the following practices consistently appeared as key characteristics of high-performance:

- A Mission-Centered Campus
- Strong Leadership
- Effective Parent/Guardian Communication and Engagement
- Connections Inside and Outside the Campus
- Strong Instructional Staff
- Teacher Professionalism and Autonomy
- Evidence-Based Curricula and Instructional Strategies
- High Academic Expectations for All Students
- Campus-Wide Student Behavior Systems
- Integration of Non-Academic Skills and Providing a Well-Rounded Student Experience



GRANTMAKING STRATEGY SCREEN STAGE 1

Health & Wellness



Human Needs



Affordable Housing



Education



Scholarships & Talent Retention



Would this investment:

- ☐ Impact Fort Bend County and its residents?
- ☐ Meet TGF's 'What We Fund' criteria?
- ☐ Align with our current strategic grantmaking priorities?
- ☐ Support a Prospective Grantee currently engaged with and demonstrating activity in FBC?
- ☐ Allow TGF to maintain 80/20 funding for strategic priorities?
- ☐ Have a focus and impact on: ☐ System ☐ Individual
- ☐ Be for a Prospective Grantee that qualifies for:
 - ☐ LINC ☐ YIP ☐ ENL
- ☐ Meet criteria for:
 - ☐ Fast Track Grantee
 - ☐ Multi-Year Grantee
- ☐ Be likely to create one-off Foundation programs, reporting, or funding processes?
(eg., specialized disaster; human-centered design)

DRAFT

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GRANTMAKING STRATEGY SCREEN

STAGE 2

Health & Wellness



Human Needs



Affordable Housing



Education



Scholarships & Talent Retention



Prospective Grantee Evaluation:

☐ **Targeting TGF Core Funding Areas?**

- ☐ Health ☐ Education
☐ Human Needs

☐ **Leadership Assessment:**

- ☐ Tenure ☐ Experience
☐ Capacity

☐ **Relationship w/TGF, including the longevity and strength**

☐ **Performance (history of compliance)**

☐ **Financial sustainability:**

- ☐ Funding/Donor Diversity
☐ 990's and Third Party Audit
☐ Program: Overhead Ratio
☐ LUNA (Liquid Unrestricted Net Assets)

Notes:

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