



GEORGE FAMILY  
FOUNDATION

# 2013 annual report

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# Letter from the President

This was a year of natural endings, auspicious beginnings and emerging opportunities to make a difference on issues we care about. After twelve successful years, the Bravewell Collaborative fulfilled its plan to sunset at the end of 2013 following a culminating leadership award celebration in New York. In the space of that time, eleven national leaders in the field of integrative medicine have been honored and awarded a total of \$650,000 to support their transformative work.

Bravewell's executive committee will continue to oversee the development of its two legacy initiatives, the yearlong Duke Leadership Program in Integrative Medicine and the BraveNet practice-based research network (PBRN). BraveNet is a collaboration among nine of the leading clinical centers that together are collecting outcomes data for integrative clinical care. This work is led by Jeffery Dusek, PhD, research director of the Penny George Institute for Health and Healing, and Donald Abrams, MD, of the Osher Center for Integrative Medicine at UCSF. The sun will finally set on Bravewell in June 2015, but no further investment is needed.

Auspicious beginnings in 2013 include major financial support for an initiative of the Institute of Medicine (IOM) led by outgoing President Harvey Fineberg to improve the health of all Americans. The Foundation is investing heavily in the planning stage of the decade-long effort, *A Healthy America*, to ensure that the conception of "health" used in this ambitious national communication strategy embraces the fundamental integrative principle that people are connected in mind, body and spirit with immense self-healing capacities.

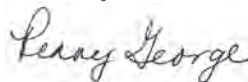
Another important beginning was significant seed funding to create the Academy for Contemplative and Ethical Leadership. The Foundation encouraged the Mind and Life Institute to create

a mindfulness-based ethical leadership program for emerging professionals and post-graduates following on the secular ethics curriculum developed for schoolchildren. This has been a major priority for His Holiness the Dalai Lama, and we are honored to play our part in expanding this important work. Our funding will support the creation of the program as well as its first few years of operation.

More will be said about this in the 2014 annual report, but toward the end of 2013 work began on an in-house initiative we are calling Catalyst. With the mission of making Minnesota the healthiest state in the union, Catalyst will bring together individuals and communities with healthcare institutions to build a culture of health and wellness in Minnesota. Its vision is to transform consciousness around health such that people recognize self-care is the true primary care, and to empower them with knowledge, skills and expanded opportunities around stress management and resilience, physical activity and sound nutrition. Efforts will center on strategic convenings to link the many promising health initiatives already going on, and equally strategic seed grants to build momentum in targeted ways. Our goal is to help people move "upstream" from primarily seeking disease care to focusing on individual opportunities to improve personal habits and practices to optimize health and wellbeing.

It has been a rich and fulfilling year for the Foundation, and we have worked hard to be thoughtful stewards of the inevitably limited resources available to make a difference in the most compelling issues of our time.

Sincerely,



Penny George, President



This was a year of natural endings, auspicious beginnings and emerging opportunities to make a difference on issues we care about.

# Our Mission

is to foster wholeness in mind, body, spirit and community by developing authentic leaders and supporting transformative programs serving the common good.

Our Guiding Philosophy is to invest in people, programs and initiatives that further the mission of the George Family Foundation and help build the communities in which we live.

We believe in sharing the blessings we have received and in celebrating the spiritual reciprocity that exists between donors and receivers working collaboratively to make the world a better place.

## BOARD OF DIRECTORS

Penny P. George  
President

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Gayle M. Ober  
Executive Director

Robin M. Barker  
Grants & Administrative  
Manager

# Our Focus Areas

The George Family Foundation funds transformational programs and initiatives in one or more of these focus areas:

## Integrative Health & Healing

Promoting integrated approaches to health and healing is at our Foundation's core. We seek to fund programs and initiatives that advance an integrated, patient-centered approach to healing, encouraging people to take responsibility for their health, supported by a diverse team of healthcare providers.

## Leadership

Improving society through developing authentic leaders is a passion for our Foundation. Leaders exist in every part of an organization, regardless of individual responsibilities or titles. We support programs that are developing future leaders who are authentic, values-based and empowering of the leadership of others.

## Spirituality

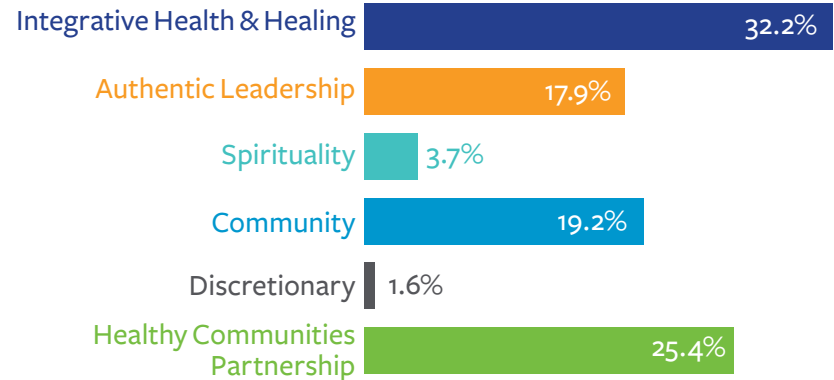
Enhancing the positive impact of religious faith and spiritual connection is important to the Foundation. We fund programs that contribute to interfaith harmony and that enrich the inner lives of individuals, families and communities.

## Community

Giving back to the communities that nurtured our own family remains a Foundation value. Developing and sustaining vital community organizations ensures the livability of these communities; we actively foster their work. Creating community within and across funded programs is also a priority.



## 2013 Total Grants Paid



Total: \$4,981,587

George Family Foundation made grants totaling 7.9 percent of our endowment during 2013.

# Integrative Health & Healing

|   |           |  |           |
|---|-----------|--|-----------|
| <p><b>Abbott Northwestern Hospital Foundation</b><br/>In fulfillment of a \$175,000 grant to support the Integrative Medicine Research Center.</p>  | \$75,000  | <p><b>Center for Spirituality and Healing/ University of Minnesota Academic Health Center</b><br/>In partial fulfillment of a \$556,000 grant to support the creation of a fellowship and co-curricular program to prepare advanced practice nurses for leadership roles in integrative healthcare institutions.</p>   | \$66,423  |
| <p><b>Abbott Northwestern Hospital Foundation</b><br/>In support of the Penny George Institute for Health and Healing.</p>  | \$40,000  |  |           |
| <p><b>Allina Health</b><br/>In support of Dr. Don Berwick's visit to Allina Health and the University of St. Thomas.</p>  | \$10,000  | <p><b>Children's Hospitals and Clinics of Minnesota Foundation</b><br/>In fulfillment of a \$150,000 grant to provide integrative nurse training.</p>  | \$50,000  |
| <p><b>American Medical Student Association</b><br/>In support of the HEART-Integrative Medicine program.</p>  | \$10,000  | <p><b>Consortium of Academic Health Centers for Integrative Medicine (CAHCIM)</b><br/>In partial fulfillment of a \$100,000 grant in support of operations and expansion of the Consortium.</p>  | \$50,000  |
| <p><b>Baldwin Area Medical Center</b><br/>In recognition of its outstanding Healthy Communities Partnership launch.</p>   | \$10,000  | <p><b>Courage Kenny Foundation at Allina Health</b><br/>In support of general operations in honor of Jan Malcolm.</p>  | \$1,000   |
| <p><b>The Bravewell Collaborative</b><br/>In support of 2013 membership dues, the Leadership Award Event and the Bravewell Fellowships for the Leadership Program in Integrative Healthcare at Duke University.</p> | \$375,000 | <p><b>Georgia Tech Foundation</b><br/>In fulfillment of a \$300,000 grant to support a collaborative effort between the Predictive Health Institute at Emory University and the H. Milton Stewart School of Industrial &amp; Systems Engineering (ISyE) to develop, launch and implement a new academic track on predictive health within the Master of Science in Health Systems program of ISyE.</p> | \$100,000 |
| <p><b>Buffalo Hospital</b><br/>In recognition of its outstanding leadership for the Healthy Communities Partnership.</p>  | \$10,000  | <p><b>Grantmakers In Health</b><br/>Funding Partner contribution for 2013.</p>   | \$3,000   |
| <p><b>Center for Spirituality and Healing</b><br/>In partial fulfillment of a \$150,000 grant to support the Educational Programs Expansion.</p>  | \$50,000  | <p><b>Hennepin Health Foundation</b><br/>In support of the University of Arizona Integrative Medicine Residency curriculum within the Family Medicine Residency Program at Hennepin County Medical Center in Minneapolis.</p>  | \$10,000  |

**Mayo Clinic** is taking an exciting step toward integrative healthcare through health and wellness. The Mayo Clinic Healthy Living Program, in the Dan Abraham Healthy Living Center, is set to open in 2014. Mayo will deliver individualized wellness experiences, helping each participant get on track to a healthy lifestyle and to stay there. Our Foundation has been instrumental in funding this program's development.

**Hutchinson Care** \$10,000  
In recognition of its outstanding partnership development for the Healthy Communities Partnership.

**Institute of Medicine of the National Academy of Sciences** \$100,000  
In partial fulfillment of a \$500,000 grant to support the Institute of Medicine's Leadership Fund for the planning of the *A Healthy America* project.

**Mayo Clinic** \$500,000  
In partial fulfillment of a \$2,000,000 grant to support the development of the Healthy Living Program.

**Minnesota Public Radio** \$25,000  
In support of the Healthy States program featuring Dr. Esther Sternberg.

**Penny George Institute Foundation** \$50,000  
In partial fulfillment of a \$100,000 grant in support of marketing and communications for the new foundation.

**Regina Medical Center** \$10,000  
In recognition of its outstanding Healthy Communities Partnership application.

**University of Wisconsin Foundation** \$50,000  
In support of Change your Mind|Change the World 2013 program.



Total Integrative Health & Healing for 2013  
**\$1,605,423**



**19 million**  
more have pre-diabetes.

**A Healthy America** is developing one of the country's largest public health information and marketing campaigns to date. Its mission is to create a continuous and enduring supply of innovative media that improves the health of Americans young and old. It is a collaboration between The Public Good Projects, an independent non-profit media organization, and the **Institute of Medicine**, part of the **National Academy of Sciences** and the world's most respected independent voice on health-related matters.

2013 Annual Report

► Our Stories: Integrative Health & Healing

# Penny George Institute Foundation

Attending the whole patient, not just to a body part or a disease, is the underpinning of the Penny George Institute for Health and Healing. Studies show nearly 90 percent of health care depends on individual behaviors, society and genetic factors; ten percent on access to clinical care. In this reality, empowering individuals with the knowledge and skills to be self-responsible is the only thing which can ensure their optimal wellbeing.

Founded at Allina Health's Abbott Northwestern Hospital, the Institute began with nursing care at the bed side and expanded to include a hospital-based clinic in 2005. In the last decade, it has grown into a clinical service line of Allina Health and the nation's largest integrative health program embedded in a health system.

Today, the Institute provides integrative health services for Allina's eleven hospitals and a variety of health and wellbeing outreach programs in the Twin Cities, greater Minnesota and Western Wisconsin. Allina plans to continue transforming health care with this patient-centered approach by increasing access to integrative medicine practices nearer patients' homes, reducing anxiety and spurring better, faster recovery.

To meet the growing demand for this model of care, focused philanthropic support is critical. The Penny George Institute Foundation is the exciting outcome of this need.

Listening to donor concerns, Allina is streamlining the process to support Allina-wide services such as Courage Kenny Rehabilitation Institute and the Penny George Institute for Health and Healing. With leadership provided by Jan Malcolm, president of the Courage Kenny Foundation, Allina allocated general operating funds and staff to launch the Penny George Institute Foundation in late 2013.

Steve Bariteau, executive director of the Penny George Institute Foundation, helped us understand the need to build awareness of the new foundation. Particularly important is funding organizational development such as strategic planning, board development,



► Nurses learn techniques during the Transformative Nurse Training at Abbott Northwestern Hospital. It is a unique educational offering grounded in holistic nursing philosophy, principles and theory. The program emphasizes relationship-centered care and introduces participants to various healing and belief systems, providing nurses with the knowledge, skills and confidence to enhance care through an integrative and holistic approach.

marketing and communications. Because of our long-term support of the Penny George Institute for Health and Healing and wanting to encourage greater expansion of the service line and its benefits throughout Allina, the George Family Foundation authorized a grant of \$100,000 to support the launch of the new foundation.

“These designated funds are crucial to getting the word out faster and better,” says Steve. “It will immediately put more tools in the hands of the people raising funds to bring the Penny George Institute’s healing practices to more people throughout Allina Health, speeding their recovery and making it possible for them to be healthier in mind, body and spirit.”



# Authentic Leadership

|  |          |   |           |
|--|----------|---|-----------|
| <p><b>Amherst College</b><br/>In fulfillment of a \$75,000 grant for the George International Scholarship Fund.</p>  | \$15,000 | <p><b>Global Action Plan</b><br/>In partial fulfillment of a \$50,000 grant to support IMAGINE: A Global Initiative for the Empowerment of Women.</p>   | \$25,000  |
| <p><b>Beta Psi Foundation</b><br/>In partial fulfillment of a \$100,000 grant to support the annual leadership training workshops and undergraduate scholarships for active Beta Psi chapter members at Georgia Tech University.</p> | \$20,000 | <p><b>Global Citizen Year</b><br/>In fulfillment of a \$50,000 grant to this organization's general operations.</p>   | \$25,000  |
| <p><b>Carleton College</b><br/>In fulfillment of a \$75,000 grant for the George Fellows International Scholarship Fund.</p>   | \$15,000 | <p><b>Harvard Business School</b><br/>In partial fulfillment of a \$250,000 grant to support the George Leadership Fellows Program in the Harvard Business School/ Harvard Kennedy School joint degree program.</p>                                 | \$50,000  |
| <p><b>The Carter Center</b><br/>In partial fulfillment of a \$250,000 grant to support the Center's Education Internship Program.</p>  | \$50,000 | <p><b>Harvard Business School</b><br/>In partial fulfillment of a \$1,000,000 grant to support the FIELD 2 global immersion program.</p>  | \$250,000 |
| <p><b>Center for Courage &amp; Renewal</b><br/>In partial fulfillment of a \$75,000 grant to support the expansion and further development of the Center's leadership programs for healthcare leaders.</p>                           | \$25,000 | <p><b>Harvard University John F. Kennedy School of Government</b><br/>In partial fulfillment of a \$640,000 grant to support the George Leadership Fellows Program in the Harvard Business School/ Harvard Kennedy School joint degree program.</p> | \$114,500 |
| <p><b>Communities Initiative</b><br/>In partial fulfillment of a \$60,000 grant to support the Dalai Lama Fellows Program.</p>   | \$30,000 | <p><b>Harvard University John F. Kennedy School of Government</b><br/>In partial fulfillment of a \$750,000 grant to support the program for the Young Global Leaders Forum.</p>  | \$125,000 |
| <p><b>Georgia Tech Foundation</b><br/>In partial fulfillment of a \$100,000 grant for the George Fellows Fund within the Health Systems Institute.</p>   | \$20,000 |   |           |



**Dalai Lama Fellows** are social innovators focused on peace, justice and ecology. Each develops a Compassion-in-Action project to create a better world. This project, Maitri, commonly translated as love and unconditional friendliness, spreads greater understanding among different sub-caste communities. Here, community leaders at the first Training of Trainers Workshop in Mumbai last December discussed The Role of Youth in Love and Compassion.

|  |                 |
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| <b>Humphrey School of Public Affairs/ University of Minnesota Foundation</b>   | <b>\$20,000</b> |
| In partial fulfillment of a \$60,000 grant to support scholarships for women and minority leaders in the non-profit sector to participate in the Policy Fellows program. |                 |
| <b>Mind and Life Institute</b>   | <b>\$50,000</b> |
| In partial fulfillment of a \$400,000 grant to support the creation of the Academy for Contemplative and Ethical Leadership.   |                 |
| <b>Sigma Chi Foundation</b>  | <b>\$10,000</b> |
| In partial fulfillment of a \$50,000 grant to support leadership programming for Beta Psi Chapter members at Georgia Tech University.                                    |                 |
| <b>St. Catherine University</b>  | <b>\$25,000</b> |
| In fulfillment of a \$50,000 grant to support the Master of Arts in Organizational Leadership global program.  |                 |
| <b>Women's Foundation of Minnesota</b>   | <b>\$20,000</b> |
| In partial fulfillment of a \$60,000 grant to support the Diversity Internship and Fellowship Program.   |                 |



Total Authentic Leadership for 2013  
**\$889,500**

# St. Catherine University

Each year our world grows smaller and our need for intercultural competence becomes more important to leaders, in business, nonprofits and education. For nearly 30 years, the Master of Arts in Organizational Leadership (MAOL) at St. Catherine University has been shaping leaders. These individuals influence their organizations to make ethical decisions that affect people of differing ages, races, religions, ethnicities and geographies. Transforming managers into effective, ethical, enduring leaders is the core of this program.

Recognizing the need to further develop its focus on leadership in an increasingly global and diverse world, the MAOL Program requested funding from the George Family Foundation in 2011 to assess, evaluate and make recommendations on the strengths and weaknesses of global capacity throughout the program. Listening deeply to the findings, program leaders applied the courageous decision-making skills they teach to improve their own work. Returning to the Foundation in 2012, MAOL requested a second grant to implement recommendations from the 2011 assessment.

The result was significant increases in faculty and administrative cultural competency, curriculum changes and the development of a study-abroad program. By starting with investments in its faculty and curriculum, MAOL was able to implement sweeping changes in an efficient and effective manner over a short time span.

“Intercultural learning is very deep and very personal,” says Director Rebecca Hawthorne, PhD. “Engaging our teaching corps in this work through dedicated faculty development made a huge difference in our ability to implement the changes recommended in the 2011 program assessment.”

Through their MAOL work, students better understand their personal strengths and gain skills and knowledge related to what it means to lead. They are better prepared to engage the heart, mind and spirit of an organization – its people.

Employing our passion for leveraging resources and to encourage others to make annual contributions to MAOL, GFF required a 1:1 match from new or increased contributions to be fulfilled by the end of 2013. St. Catherine’s not only met the \$25,000 match, but exceeded it. These matching funds make it possible to offer \$1,000 scholarships for students to take advantage of MAOL’s new study-abroad program.

Through their MAOL work, students better understand their personal strengths and gain skills and knowledge related to what it means to lead. They are more prepared to engage the heart, mind and spirit of an organization – its people.

► MAOL graduate students Bryan Anderson and Katrina Volker discuss global leadership dilemmas in their Professional and Organizational Ethics course.





**Interfaith Youth Core** alumni gathered in Atlanta in January 2014 to discuss successes and challenges in the interfaith movement at the first ever IFYC Alumni Gathering.

Below: Interfaith Youth Core Alumni describe their journeys and discuss what interfaith leadership means to them at the New York City Interfaith Leadership Institute (ILI), August 2013. Pictured left to right: Eboo Patel, Founder and President, IFYC; Joshua Stanton, Assistant Rabbi at Temple B'nai Jeshurun in Short Hills, New Jersey; Lauren Parnell Marino, Community and Mobilization Manager at Ashoka; Ansaf Kareem, MBA Student at Harvard Business School; Anand Venkatkrishnan, PhD student in the Department of Religion at Columbia University.



# Spirituality

|  |          |
|--|----------|
| <b>Auburn Theological Seminary</b><br>In fulfillment of a \$40,000 grant to support the Auburn Fellows Program, including the Mountain Top national gathering.   | \$30,000 |
| <b>The Beatitudes Society</b><br>In partial fulfillment of a \$50,000 grant to provide resources and tools for emerging progressive Christian leaders to develop their capacity for preaching, public advocacy and sustained spiritual practice. | \$25,000 |
| <b>House of Prayer</b><br>In support of this organization's general operations.  | \$2,500  |
| <b>Interfaith Youth Core</b><br>In partial fulfillment of a \$375,000 grant to support the building of IFYC's Alumni Network.  | \$75,000 |
| <b>Tergar International</b><br>In support of this organization's general operations.   | \$10,000 |
| <b>St. Paul Area Council of Churches</b><br>In fulfillment of a \$22,500 grant to support the Interfaith Youth Leadership Program.   | \$7,500  |
| <b>Sojourners</b><br>In partial fulfillment of a \$150,000 grant to support the Women and Girls Leading on Faith and Justice Program.  | \$35,000 |



Total Spirituality for 2013  
**\$185,000**

# On Being with Krista Tippett

Convening discussions that change people's thinking and their lives is the intent of *On Being* with Krista Tippett. Krista addresses difficult questions by engaging a range of people in deep conversations. She covers topics big and small, well-known and obscure. Importantly, these are conversations everyday people want and need to hear to stretch their minds and help them discover their inner selves and inner peace. These conversations nurture a more civil society.

It isn't often a public media program is able to launch, grow and reinvent itself in less than 15 years, but that is the story of *On Being* with Krista Tippett. What began in 1999 as an occasional radio show of Minnesota Public Radio has grown into today's leading public media program addressing the basic questions of meaning that pertain to the entire human experience. Its weekly programs, public conversations and educational materials are available on public radio stations across the U.S., streamed on the Internet and delivered by podcast with weekly audiences surpassing one million people.



In 2012, *On Being* boldly separated from American Public Media to become an independent media entity. The process resulted in the creation of a new cultural identity that provides flexibility and nurtures creativity to allow *On Being* to exceed well beyond its beginnings as a regional public radio program.

As an independent entity, *On Being* needed to build a new infrastructure; it particularly needed to build a solid funding base. 2013 funding from the George Family Foundation provided seed money to develop an individual fundraising program as well as to support general operating expenses. In collaboration with Krista and *On Being*'s Board of Directors, the Foundation created a 1:1 matching grant to leverage our grant and build individual support to continue into the future.

"Penny and Bill George saw the potential in this program right from the very beginning and have consistently supported us since 2000," says Krista. "The questions asked by the Foundation propelled us to make decisions that ultimately enabled us to grow and become an independent organization."

One listener describes the show's lasting impact. "From Teilhard de Chardin through Brian Greene and the blog from a former Orthodox Christian to an Islam convert, this format reaches beyond spacious conversation. You touch souls more deeply than ever before. From a quiet corner overlooking the New England Coast, one listener sends you gratitude for moments that sustain."

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"Penny and Bill George saw the potential in this program right from the very beginning and have consistently supported us since 2000," says Krista. "The questions asked by the Foundation propelled us to make decisions that ultimately enabled us to grow and become an independent organization."

# Community

|  |          |  |           |
|--|----------|--|-----------|
| <b>Bravo! Vail Valley Music Festival</b><br>In support of this organization’s artistic programs. (Colorado)  | \$10,000 | <b>Eagle Valley Land Trust</b><br>In support of this organization’s general operations to help ensure that the future of Eagle County includes scenic vistas, wildlife habitat and open ranchlands. (Colorado)     | \$10,000  |
| <b>Beacon Interfaith Housing Collaborative</b><br>In partial fulfillment of a \$20,000 grant to support Nicollet Square Supportive Services for homeless youth aging out of the foster care system.  | \$10,000 | <b>Earned Assets Resource Network</b><br>In support of EARN’s programs from the Next Generation Fund on behalf of Jeffrey George and Jonathan George. (California)   | \$5,000   |
| <b>Breaking Free</b><br>In partial fulfillment of a \$75,000 grant to support the development of an anti-sex trafficking awareness and prevention curriculum for male/female youth.                  | \$25,000 | <b>Environmental Defense Fund</b><br>In support of this organization’s general operations for the Oceans program from the Next Generation Fund on behalf of Jeffrey George and Jonathan George. (Washington, D.C.) | \$5,000   |
| <b>Breck School</b><br>In support of international scholarships for students with financial needs from the Next Generation Fund on behalf of Jeffrey George and Jonathan George.                     | \$25,000 | <b>Guthrie Theater</b><br>In partial fulfillment of a \$1,000,000 grant to support the Joe Dowling Guthrie Theater Innovation Fund, including support of the theater’s Annual Fund.                                | \$275,000 |
| <b>Children’s Heartlink</b><br>In support of this organization’s general operations to build local organizations’ capacity to save the lives of children with heart disease in the developing world. | \$10,000 | <b>Hamm Clinic</b><br>In partial fulfillment of a \$90,000 grant to support clinical training annually for two interns in the field of professional psychology.  | \$20,000  |
| <b>City Year, Inc.</b><br>In support of this organization’s general operations from the Next Generation Fund on behalf of Jeffrey George and Jonathan George. (Massachusetts)                        | \$5,000  | <b>Kairos Alive!</b><br>In fulfillment of a \$10,000 grant to support this organization’s general operations.  | \$5,000   |
| <b>College Possible</b><br>In partial fulfillment of a \$45,000 grant to support the programming costs to help promising low-income youth in Minnesota gain admission to college.                    | \$15,000 | <b>Karuna-Shechen</b><br>In support of this organization’s general operations to provide education, medical and social services in Tibet, Nepal and Bhutan. (New York)   | \$15,000  |
|  |          | <b>Marnita’s Table</b><br>In partial fulfillment of a \$20,000 grant to support this organization’s general operations.  | \$10,000  |
|  |          | <b>MicroGrants</b><br>In fulfillment of a \$30,000 grant to support this organization’s small grants program.  | \$10,000  |

|   |          |
|---|----------|
| Minneapolis Institute of Arts<br>In support of the museum's Annual Fund.  | \$10,000 |
| Minneapolis Parks Foundation<br>In partial fulfillment of a \$30,000 grant to support this organization's general operations.                                   | \$10,000 |
| Minnesota Indian Women's Resource Center<br>In partial fulfillment of a \$45,000 grant to support the Organizational Healing: Toward Shared Leadership project. | \$15,000 |
| Minnesota International Center<br>In support of this organization's general operations.   | \$10,000 |
| Minnesota Public Radio<br>In support of this organization's Annual Fund.  | \$10,000 |
| National Parks Conservation Association<br>In support of this organization's Annual Fund. (Montana)   | \$10,000 |
| The Nature Conservancy<br>In fulfillment of a \$30,000 grant to support the Caribbean Program. (Virginia)   | \$10,000 |
| Neighborhood Development Center<br>In fulfillment of a \$75,000 grant to support the Midtown Global Market Breakthrough Campaign.                               | \$25,000 |
| Neighborhood Involvement Program<br>In partial fulfillment of a \$50,000 grant to support this organization's general operations.                               | \$10,000 |
| One Heart World-Wide<br>In support of the implementation of a Network of Safety for mothers and newborns in rural Western Nepal. (California)                   | \$10,000 |
| Page Education Foundation<br>In partial fulfillment of a \$50,000 grant for general operations.   | \$10,000 |



Homeless youth pause before a family-style meal at the **Reciprocity Foundation** to offer thanks. The Reciprocity Foundation is a non-profit organization based in New York City that offers Contemplative Programming — meditation, yoga, spiritual direction, holistic care — to homeless and vulnerable youth living in shelters and group homes. It has helped over 1,000 young people transform their minds, hearts and lives in the past nine years.



Page Scholar Merone Melekin, senior at the University of Minnesota-Twin Cities, tutors at Phalen Lake Elementary School every week. In exchange for financial support for their post-secondary education, **Page Education Foundation Scholars** complete at least 50 volunteer hours serving youth in grades K-8.

|  |          |
|--|----------|
| Planned Parenthood of Minnesota, North Dakota, South Dakota<br>In partial fulfillment of a \$300,000 grant to support the Youth Education and Development Program.                                       | \$60,000 |
| Playworks Twin Cities<br>In partial fulfillment of a \$30,000 grant to support this organization's general operations.   | \$10,000 |
| Project SUCCESS<br>In support of this organization's general operations.   | \$10,000 |
| The Reciprocity Foundation<br>In support of this organization's general operations from the Next Generation Fund on behalf of Jeffrey George and Jonathan George. (New York)                             | \$5,000  |
| Ripple Effect Images<br>In partial fulfillment of a \$50,000 grant to support this organization's general operations.  | \$25,000 |
| Somali Success School<br>In partial fulfillment of a \$40,000 grant to support this organization's general operations.   | \$20,000 |
| Teach For America, Twin Cities<br>In support of this organization's general operations.  | \$5,000  |
| Twin Cities Public Television<br>In support of this organization's Annual Fund.  | \$5,000  |
| Twin Cities RISE!<br>In support of this organization's general operations.   | \$30,000 |
| University of St. Thomas<br>In fulfillment of a \$10,000 grant to support the internship of a pre-doctoral graduate student at the Interprofessional Center for Counseling in honor of Dr. Burton Nolan. | \$5,000  |
| Walk-In Counseling Center<br>In support of this organization's general operations.   | \$10,000 |



Walking Mountains Natural Science School \$50,000  
In fulfillment of a \$150,000 grant to support the Walking Mountains Science Center's Community Programs. (Colorado)

Washburn Children's Center \$25,000  
In fulfillment of a \$75,000 grant to support this organization's general operations.

The Wilderness Society \$5,000  
In support of this organization's general operations in the Colorado office from the Next Generation Fund on behalf of Jeffrey George and Jonathan George. (Colorado)

Women's Foundation of Minnesota \$50,000  
In partial fulfillment of a \$250,000 grant to support the Minnesota Girls are Not For Sale anti-sex-trafficking initiative.

Youth Farm and Market Project \$15,000  
In fulfillment of a \$45,000 grant to support urban agriculture, youth organizing and cultural nutrition programs.

The Youth Foundation \$10,000  
In support of this organization's general operations. (Colorado)

Youth Frontiers \$20,000  
In fulfillment of a \$60,000 grant to support character-building retreats for elementary, junior high and secondary students and faculty.

YWCA of Minneapolis \$10,000  
In fulfillment of a \$30,000 grant to support the Girls Incorporated program.

Note: All organizations are located in Minnesota unless otherwise indicated.



Total Community for 2013  
**\$955,000**



Above: A group of new refugees during a literacy and orientation class at **Somali Success School**. Besides learning English and literacy skills, this course teaches new immigrants how to navigate through their new community and become independent.

Below: Lenore used her **EARN** savings to buy her son a computer for his schoolwork. Nathaniel used to stay in at lunchtime to do his homework in a hurry on the classroom computer. Now, he's an honor-roll student on his way to college.



# Youth Frontiers

Fostering safe, positive school communities where students and educators thrive emotionally, socially and academically is even more important today than it was a quarter of a century ago when Youth Frontiers (YF) was founded.

Since 1987, YF has challenged more than 1.3 million youth across our country to live lives of good character. Its vision remains strong: change the way young people treat each other in the hallways, lunch lines and classrooms of every American school. YF prepares today's young people to make tomorrow's world better.

YF brings students day-long retreats on the values of kindness, courage, respect, responsibility and wisdom. Through music, powerful messages, games and small-groups facilitated by older student leaders, students learn how to stand up to bullies, treat others with respect and be leaders in their schools.

Three years of research by University of Minnesota's Center for Applied Research and Educational Improvement, an internationally-recognized leader in educational research and evaluation, showed positive results. After the YF's Respect Retreat, 16 percent more students reported their classmates resolve conflicts without fighting, insults or threats. One school administrator believes, "These retreats give schools a platform and a language to use with students when it comes to things like how they treat each other and how they behave at school."

Recognizing YF's attention to results and its focus on doing one significant thing extremely well, the George Family Foundation has granted YF modest operating support since 2003. We've continued this support for 10 years because of YF's exemplary work increasing program quality and impact, managing growth and diversifying its revenue base.

Determined to address the critical middle school years and curb bullying and disrespect in St. Paul Public Schools, Superintendent Valeria Silva engaged with YF to help her students. This significant agreement with one of Minnesota's largest and most diverse districts is a growth milestone. Contributions from individuals and foundations, including us, helped YF build infrastructure and organizational capacity, conduct research and seek focused opportunities for additional expansion.



"We transform young people's hearts which makes a difference in how they treat each other," says YF Founder and CEO Joe Cavanaugh. "Only by creating a generation of kids who treat each other with respect, compassion and empathy will we change the world for the better."

A student sums it up. "I didn't have friends. After the retreat, everyone is talking to me. Some want to be my friends. So, thank you, Youth Frontiers."

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Since 1987, YF has challenged more than 1.3 million youth across our country to live lives of good character. Its vision remains strong: change the way young people treat each other in the hallways, lunch lines and classrooms of every American school. YF prepares today's young people to make tomorrow's world better.

# Healthy Communities Partnership

For almost two decades, Integrative Health and Healing has been a focus area for our Foundation. The Healthy Communities Partnership (HCP) launched an exciting community-generated health programming in 2013. Thanks to a \$5 million, multi-year collaboration between the Foundation and our longtime partners, Allina Health and the Penny George Institute for Health and Healing, 13 local communities are working to foster greater awareness of individual wellness and community health resources.

The Penny George Institute believes that medicine can be transformed by providing outstanding patient-centered care through the use of integrative health practices and philosophies focusing on prevention and wellness, activation of the body's natural healing capacity and development of self-care skills. Experience has taught us that greater health and healing can be achieved when people have a better understanding of what they can do to improve their own health and are supported in doing so.

HCP is a logical extension of the Penny George Institute's work. The initiative encourages hospitals and local leaders in 13 Minnesota and Western Wisconsin pilot sites to develop and build awareness of health initiatives for local residents. These partnerships are informed by the integrative health philosophy and the distinctive interests and health priorities of each community. As HCP programming continues through 2015, the initiative intends to improve community health by:

- Enhancing and strengthening each local health care system's role within the local community wellness infrastructure and networks;
- Improving community member wellness by conducting annual screenings and education;
- Developing strategies to sustain community health improvement efforts through changes in policy, practices and systems, and identifying resources to partner with community hospitals' and clinics' work.

## Local activities have begun

Last year, local initiatives in HCP communities performed baseline screenings on more than 5,700 individuals. People participating at the local level used an interactive website, Family Health Manager, allowing HCP, medical professionals and residents to track the individuals' progress. At the same time, local care systems hired program ambassadors and care guides to build and deepen relationships with individuals in their community and connect them to a wide variety of community resources. The local programs coordinated teams to design and implement larger-scale health promotion activities, sometimes even advocating for policy changes.

Ten of the sites began by looking at their own healthcare institution and developed programs, classes and screenings for their respective staffs. Eleven sites reached out to local employers offering different combinations of screening, education and coaching activities. Most sites are also planning community-wide efforts to raise residents' awareness of and encourage their participation in healthy lifestyle options.

Patricia Sorensen, MD, Ridgeview Delano Clinic, and her family. Dr. Sorensen is the lead physician for the Healthy Delano initiative.





Healthy Delano celebrated its inaugural year by participating in the community-wide St. Paul Saints Baseball Event in Delano (May 11, 2013). More than 40 kids and their families enjoyed a “Stretch with the Saints” pre-game activity (led by My Body Shop Fitness).

## Examples of local projects:

- Riverwood Healthcare’s “Zumba-thon” got people moving (Aitkin, Minn.);
- Grand Itasca Clinic and Hospital collaborated with Arrowhead Promotions to design the company’s first formal wellness program benefiting lower-income workers with health screenings, immediate coaching and referrals to free clinics (Grand Rapids, Minn.);
- Hutchinson Health, in partnership with the Southwest Initiative Foundation, plans to transform unused land into a community garden (Hutchinson, Minn.);
- River Falls Area Hospital conducted ergonomic assessments at local community work sites (River Falls, Wisc.).

## Formal evaluation is beginning

In 2013, our Foundation engaged Rainbow Research to independently evaluate local HCP programs. Rainbow Research’s evaluation team worked with the HCP sites, Allina Health’s research team, Penny George Institute project staff and our Foundation to define key questions and determine the best tools and approaches to measure progress of individuals’ health. The research will also help us better understand, over time, HCP’s influence on each community’s use of its health and wellness resources. Rainbow Research will use case studies, Social Network Analysis and Ripple Effect Mapping to track how the pilot communities share information and resources with each other. Also, the research will examine HCP’s impact on these communities over the initiative’s remaining two years.

Rainbow Research reports that HCP sites are, in general, off to a solid start in terms of initial screenings and program implementation. We learned important lessons during the first year of evaluation. These include:

- Engagement is key at all levels – from individuals to HCP partners, to the community-at-large – to position HCP for success.
- Messages and outreach strategies must be tailored to suit the unique needs of each community.
- Building on existing partnerships and collaborations prevents duplication and increases momentum around community health.

In the past year, people in our pilot communities became more aware of and increased use of the wide variety of community health and wellness resources available to them. They are also gaining better understanding of the power of being more engaged in their own wellness goals and practices.



Total Healthy Communities Partnership for 2013

\$1,266,664

# Financial Summary

## Statement of Financial Position

December 31, 2013 and 2012

| ASSETS                                | COST (\$)           |                     | MARKET (\$)         |                   |
|---------------------------------------|---------------------|---------------------|---------------------|-------------------|
|                                       | 2013                | 2012                | 2013                | 2012              |
| Investments:                          |                     |                     |                     |                   |
| Equities                              | \$28,609,972        | \$29,116,546        | \$42,577,730        | \$33,372,335      |
| Fixed Income                          | \$16,307,899        | \$20,881,235        | \$16,504,125        | \$21,392,390      |
| Cash and Cash Equivalents             | \$3,423,841         | \$2,207,336         | \$3,982,639         | \$2,631,730       |
| <b>Total Investments</b>              | <b>\$48,341,712</b> | <b>\$52,205,117</b> | <b>\$63,064,494</b> | <b>57,396,455</b> |
| Fixed Assets<br>(Net of Depreciation) | \$1,561             | \$2,411             |                     |                   |
| <b>TOTAL ASSETS</b>                   | <b>\$48,343,273</b> | <b>\$52,207,528</b> |                     |                   |
| <b>NET ASSETS</b>                     |                     |                     |                     |                   |
| Total Net Assets                      | \$51,104,028        | \$53,099,239        |                     |                   |



Ambitious Vail Resort employees and their families volunteered to plant 300 willow trees and 250 shrubs along the Eagle River. They also hand-built a new hiking and biking trail and celebrated the Duck Pond River Access conservation easement's new permanent conversation status. We support the Trust's general operations to ensure that the future of Eagle Valley in Colorado continues to include the scenic views, wildlife habitat and open ranch lands our family has long enjoyed.

\*2013 and 2012 are actual numbers from the Foundation's tax return.



Penny and Bill George with the 2013-2014 George Leadership Fellows at the fall Center for Public Leadership Fellows retreat at the home of Anne and David Gergen on Cape Cod. George fellows are selected from students in their final year of the **Harvard Business School/Harvard Kennedy School** joint degree program based on demonstrated interest in community and organizational transformation through public service, activism and social entrepreneurship, as well as a commitment to working in two of three designated areas—the public sector, private sector, and nonprofit sector—over the course of their careers. Special emphasis in the program is placed upon character development and ethical leadership.

## Statement of Activities\*

For the Years Ending December 31, 2013 and 2012

|                                     | 2013                | 2012                |
|-------------------------------------|---------------------|---------------------|
| <b>REVENUE</b>                      |                     |                     |
| Interest & Dividends                | \$1,331,512         | \$1,642,201         |
| Realized Gain/(Loss) on Investments | \$1,166,918         | \$1,767,406         |
| Contributions                       | \$1,429,994         | \$1,956,940         |
| Other Income                        | \$33,284            | \$912,052           |
| <b>Total Revenue</b>                | <b>\$3,961,708</b>  | <b>\$6,278,599</b>  |
| <b>EXPENSES</b>                     |                     |                     |
| Taxes Paid                          | \$54,278            | \$46,127            |
| Program Expense                     | \$305,840           | \$75,319            |
| General & Administrative Expense    | \$98,681            | \$79,541            |
| Professional Fees                   | \$238,714           | \$278,791           |
| Salaries, Taxes & Benefits          | \$277,819           | \$255,135           |
| Grant Commitments Paid              | \$4,981,587         | \$4,289,840         |
| Return of Investments**             | \$1,845,779         | \$ -                |
| <b>Total Expenses</b>               | <b>\$5,956,919</b>  | <b>\$5,024,753</b>  |
| Net Income / (Loss)                 | \$(1,995,211)       | \$1,253,846         |
| Net Assets – Beginning of Year      | \$53,099,239        | \$51,845,393        |
| <b>Net Assets – End of Year</b>     | <b>\$51,104,028</b> | <b>\$53,099,239</b> |

\* 2013 and 2012 are actual numbers from the Foundation's tax return.

\*\* Cash returned to the Foundation from distribution of private investments.



“There are few things as satisfying as working strategically and collaboratively to bring about transformative change.”

– Penny and Bill George

Photo credit: Bill Farley



GEORGE FAMILY  
FOUNDATION

1818 Oliver Avenue South, Minneapolis, MN 55405  
(612) 377-3356 ph (612) 233-2194 fax  
[www.georgefamilyfoundation.org](http://www.georgefamilyfoundation.org)