2011 Annual Report
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Letter from the President

This year The George Family Foundation contributed $2,587,071 to organizations and programs that are making a significant difference in the world according to values we cherish. This report highlights those grants and features a few organizations whose work we hope will interest you, perhaps enough to join us in supporting their efforts.

The Women’s Foundation of Minnesota is leading an ambitious effort to coordinate statewide community partners to address a very serious problem in Minnesota – the prostitution of girls under age 18. In fact, the FBI has identified the Twin Cities as one of the nation’s 13 largest centers for child prostitution. While it is not a focus area for the Foundation, we believe this is a crisis all Minnesota residents should play a role in solving. The George Family Foundation was among the first to sign on to this five-year, $4 million effort to address the public policy, social service, legal and law enforcement requirements for an effective multi-jurisdictional, statewide response.

Georgia Tech and Emory University have developed a remarkable degree of collaboration in the emerging field of predictive health. Some years ago the Dean of Engineering at Tech and the President of Emory agreed to combine their schools’ complementary resources to make it possible for students at each institution to apply their energies toward improving the nation’s health. In particular, they saw the opportunity to mine, for what it can tell policy leaders, the growing mass of health information (more than 2,000 data points per person) being gathered on Emory employees who come to the school’s Predictive Health Institute. Such mining is a natural skill set for the students in the master of science in health systems program at Tech, part of the highly regarded Stewart School of Industrial and Systems Engineering (ISyE). The three-year George Family Foundation grant will permit a predictive health track within ISyE to become fully operational, providing infrastructure support to Tech as well as fellowships to students doing the research.
Honoring Choices Minnesota is a community collaborative effort led by the Twin Cities Medical Society that seeks to apply to the Twin Cities the excellent lessons and results from a similar successful program developed a few years ago in LaCrosse, Wisconsin. Beginning with all people in the northwest quadrant of the Twin Cities (and the rest of the Cities in the future), the goal of Honoring Choices is to empower individuals to understand and articulate their end-of-life preferences, that those wishes be honored. Too many people today end up with decisions by default and an experience of dying that they never would have chosen. George Family Foundation funding is helping to train facilitators with the skills to engage families across diverse cultures in these sensitive discussions.

The Penny George Institute for Health and Healing is more than fulfilling our hopes. The remarkable team there has demonstrated that integrative care is clinically effective in reducing pain and anxiety in a hospitalized population. In addition, its research has shown that it saves the hospital more than $2,000 per person per admission. Not surprisingly, the integration of healing therapies into the care provided at Abbott Northwestern Hospital has led to improved patient experience, one of the Institute of Medicine’s “Triple Aims.” There is a great deal the George Institute can still contribute to the emerging care models that focus on health and wellbeing, and we are grateful that both the hospital and Allina Health leadership teams appreciate the value the Institute brings.

In this year’s annual report we feature four exemplary organizations and programs. Rather than highlighting the heads of various organizations we have funded, as in the past, this year we are describing the work itself. Even with 350 carefully chosen words, it is hard to do justice to both. We hope you will enjoy reading the report and invite any feedback.

Sincerely,

Penny George
President
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 who are furthering the mission of the George Family Foundation and helping 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.

Marnita’s Table hosted Together We Succeed Table where 95 people came together, at the home of Bruce Watkins, superintendent of the St. Cloud Area School District, to explore ways that students and their parents can get the most out of their public school education and achieve excellence - all over an abundant feast.
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 ensure the livability of these communities; we actively foster their work. Creating community within and across funded programs is also a priority.

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrative Health &amp; Healing</td>
<td>$900,000</td>
<td>34.8%</td>
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<tr>
<td>Leadership</td>
<td>$576,821</td>
<td>22.3%</td>
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<tr>
<td>Spirituality</td>
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<tr>
<td>Community</td>
<td>$822,250</td>
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<tr>
<td>Discretionary</td>
<td>$88,000</td>
<td>3.4%</td>
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“We’re changing the way patients and healthcare professionals look at what we do,” says Dr. Penny Wheeler, chief clinical officer at Allina Health. “As a physician, it’s humbling to realize only ten percent of healthcare is about access to clinical care. The remaining 90 percent rests with the individual’s behaviors, society and genetic factors. This is a major shift in our thinking. It says patients need to be more personally accountable if they want to have optimal wellbeing. Acknowledging this change is an early step on the path to improving and sustaining health.”

The Penny George Institute for Health and Healing is creating new care models locally and extending knowledge to the rest of the nation. It’s expanding the definition of care to include a more collaborative relationship between patients and their care providers. Through that deeper connection, a broader meaning of wellness is emerging.

The George Institute is the largest hospital-based program of its kind – integrating clinical care, research and education. Robust clinical program results show measurable decreases in patients’ self-reported pain and anxiety. A recent study of more than 1,800 patients published in the *Journal of Patient Safety* reported an average immediate pain reduction of 56 percent, with 33 percent reporting complete pain relief. These clinically relevant results were consistent across multiple clinical populations (cardiac, orthopedics, spine, rehabilitation, medical and surgical, and women’s health).

Allina appreciates the value of these important care delivery changes. In recognition, it has designated the George Institute one of its service lines. Providers and patients across Minnesota’s largest healthcare system are benefiting from seeing patients as whole people with the potential to do much more to achieve optimal wellbeing.

With the Bravewell Collaborative, the George Institute is also influencing how care is delivered nationally. The Collaborative believes approaches like health promotion, wellness and treating the whole person can help shape a more effective and efficient healthcare system. It envisions more patient-centered care with centers of excellence which improve outcomes, patient satisfaction and reduce cost. Applying these principles at the George Institute, Abbott Northwestern Hospital and Allina are taking patient care to a new level, in Minnesota and beyond. ♦
Integrative Health & Healing

Abbott Northwestern Hospital Foundation $420,000
In fulfillment of a $1,750,000 grant to support the Penny George Institute for Health and Healing. This also includes support of the hospital’s Annual Fund and other major fundraising projects including the Mother Baby Center.

The Bravewell Collaborative $100,000
In support of 2011 membership dues and the Bravewell Physician Leadership Award Event.

Center for Spirituality and Healing/University of Minnesota Academic Health Center $95,000
In partial fulfillment of a $556,000 grant to support the creation of a fellowship and co-curricular program that will prepare advanced practice nurses to be leaders in the integrative healthcare institutions of the future.

Children’s Hospitals and Clinics of Minnesota Foundation $50,000
In partial fulfillment of a $150,000 grant to provide integrative nurse training.

Courage Center $30,000
In support of the Mind Body Integration curriculum for Courage Center staff and other rehabilitation professionals to promote best practices.

East Metro Medical Society Foundation $50,000
In support of Honoring Choices Minnesota, a community collaborative to promote conversations and directives about values and beliefs concerning end-of-life care.

Georgia Tech Foundation $100,000
In partial 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 & Systems Engineering (ISyE) which will develop, launch and implement a new “track” on predictive health within the Master of Science in Health Systems program of ISyE.
University of Minnesota’s Center for Spirituality & Healing is advancing nursing leadership in integrative health and healing. One component is a year-long fellowship for Doctorate of Nursing Practice (DNP) students in their final year of study. The first cohort of George Fellows includes (from left) Judy Wagner, Laurie Kubes, Laura Sandquist and Katherine Todd.
Leadership

Amherst College $15,000
In partial fulfillment of a $75,000 grant for the George International Student Scholarship Fund.

Carleton College $15,000
In partial fulfillment of a $75,000 grant for the George Fellows International Scholarship Fund.

The Carter Center $50,000
In partial fulfillment of a $250,000 grant to support the Center’s Education Internship Program.

Georgia Tech Foundation $20,000
In fulfillment of a $100,000 grant for the George Fellows Fund within the Health Systems Institute.

Global Action Plan $25,000
In partial fulfillment of a $50,000 grant to support IMAGINE: A Global Initiative for the Empowerment of Women.

Harvard Business School $47,500
In partial fulfillment of a $250,000 grant to support the George Fellows Program: students pursuing a concurrent degree with the John F. Kennedy School of Government (HKS) who are entering their third year of the Harvard Business School/HKS concurrent degree program.

Harvard University John F. Kennedy School of Government $124,321
In partial fulfillment of a $1,000,000 grant to support the George Family Leadership Development Fund, includes support for the Center for Public Leadership’s fall retreat.

Harvard University Center for Public Leadership $40,000
In fulfillment of a $210,500 grant to support co-curricular offerings in leadership development for Harvard Kennedy School students.

Institute of Medicine of the National Academy of Sciences $150,000
In partial fulfillment of a $450,000 grant to support the Institute of Medicine President’s Initiatives Fund.

Continued on page 11
A global initiative for empowering women, IMAGINE is training women in countries marred by war and political unrest to envision and create new possibilities for their lives, families and communities. Working with leading non-government organizations in India, Jordan, Sudan, Afghanistan, Nigeria, South Africa and Kenya, participants are leveraging their IMAGINE empowerment training to create the world in which they want to live. They are using the new voice and inner strength they develop to ripple out the effect by training hundreds of women in their home countries.

IMAGINE invites participants to reflect on such personal aspects in their lives as emotions, relationships, money, work, spirituality. While many empowerment programs focus on external factors, IMAGINE believes seeing the interconnectedness of these critical areas helps each understand her life story in a new way, giving her courage to become a change agent. Identified leaders in their own countries, each woman commits to train and mentor a minimum of 200 women, who each share this learning with 20 more – family, friends, community members. All work to create greater meaning for themselves and to make their lives and the lives of others in their communities better.

Gail Straub, IMAGINE and Empowerment Institute co-founder with her husband David Gershon, says, “It’s inspiring and energizing to engage the highest caliber women who find their voices and give their very best to their communities.”

IMAGINE’s focus is on enhancing human agency – knowing your deepest self and using that knowledge to change your world. This self-understanding complements existing development programs that provide resources, skills or opportunity to underserved populations. IMAGINE’s unique contribution is its ability to harness an individual’s capacity for self-efficacy and positive behavioral change; thus allowing traditional women’s empowerment interventions around micro-lending, education and health to achieve better traction.

The program combines leadership and the power of women to change their communities with an approach that goes deep into the heart of the individual. Only in this holistic way can we harness the human potential to solve the very grave problems in developing worlds and elsewhere. ✿
Sigma Chi Foundation
In partial fulfillment of a $50,000 grant to support leadership programs for Beta Psi Chapter members at Georgia Tech University.

Sojourners
In fulfillment of a $20,000 grant to support the Emerging Faith Leaders Program and partial fulfillment of a $50,000 grant to support the Women/Girls’ Social Justice Leadership Program.

St. Catherine University
In support of the Master of Arts in Organizational Leadership Global Initiative.

Women’s Foundation of Minnesota
In partial fulfillment of a $60,000 grant to support the Diversity Internship and Fellowship Program.

TOTAL LEADERSHIP FOR 2011

$576,821
**Spirituality**

**The Beatitudes Society**
In 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

**House of Prayer**
In support of this organization’s general operations. $2,500

**Interfaith Youth Core**
In support of the planning and start up of an Interfaith Youth Core Alumni Leadership Program. $55,000

**Mind and Life Institute**
In partial fulfillment of a $250,000 grant to support this organization’s general operations and to foster scientific work on Buddhist contemplative practices. $50,000

**Minnesota Public Radio | American Public Media**
In fulfillment of a $50,000 grant to support capacity building for the *Krista Tippett on Being* program. $25,000

**St. Paul Area Council of Churches**
In partial fulfillment of a $22,500 grant to support the Interfaith Youth Leadership Program. $7,500

**Tergar International**
In support of this organization’s general operations. $35,000

**Total Spirituality for 2011** $200,000
Social justice and world peace aren’t mere platitudes at Sojourners where personal faith and political issues intersect. Sojourners puts faith into action. Thinking about the spiritual implications of societal issues helps its advocates envision a just and sustainable future for all people.

Through its Emerging Faith Leaders fellowship program, funded in part by the George Family Foundation, young people learn how to bring social justice to marginalized communities using both skill and conviction.

During their year-long commitment, participants live and work together, forming an intentional community, and their lives are changed forever. While their basic needs are met, they are restricted to small monthly stipends for other expenses. This strengthens their compassion for the underserved and helps them gain a greater understanding of how to live with fewer resources, a struggle common to those living in poverty. They assist Sojourners’ staff in advocating for programs that protect the lives and dignity of the most vulnerable citizens of our country.

Mentors assist the fellows with opportunities for personal growth and learning as well as guiding these emerging leaders toward understanding the importance of nurturing their own spiritual and emotional health during long-term social justice work. One of their most important learnings is that taking care of themselves, spiritually and mentally, is as important as conflict resolution and other technical work skills.

“Spirituality, healing and social justice go hand in hand. To be an activist, you need sustaining practices, like prayer and contemplation, to maintain and grow your activism over the long haul. The converse is also true. We prepare young adults to live balanced lives,” says Rob Wilson-Black, Sojourners’ chief development officer.

Sojourners links Christian direction with social justice issues and takes people back to what is at the heart of Christianity – looking out for the least of our brethren. In this age of shrinking budgets and diminishing compassion, Sojourners helps us to remember the needs of those who cannot advocate for themselves. ✴
Community

Admission Possible $15,000
In partial fulfillment of a $30,000 grant to support programming costs helping promising low-income youth in Minnesota gain admission to college.

Association of Small Foundations $695
In support of general operations for 2011. (Washington, D.C.)

Bravo! Vail Valley Music Festival $10,000
In support of this organization’s artistic programs. (Colorado)

Breck School $10,000
In support of international scholarships for students with financial needs from the Next Generation Fund on behalf of Jeffrey George and Jonathan George.

Carolina for Kibera $13,000
In partial fulfillment of a $26,000 grant to support the 10th Anniversary Campaign. (North Carolina)

Children’s Heartlink $10,000
In support of this organization’s general operations to build capacity to help save the lives of children in the developing world who have heart disease.

City Year $5,000
In support of this organization’s general operations from the Next Generation Fund on behalf of Jeffrey George and Jonathan George. (Massachusetts)

Duke University $5,000
In support of the Duke University Annual Fund. (North Carolina)

Eagle Valley Land Trust $10,000
In support of this organization’s general operations to help ensure the future of Eagle County includes scenic vistas, wildlife habitat and ranchlands. (Colorado)

Continued on page 16
Planned Parenthood is one of the most important health organizations in our country. The George Family Foundation is proud to support its important work in our community – for women, men, youth and children. Annually, it is the recipient of one of our largest operations grants.

Its Youth Education and Development Program is of particular interest to us. Planned Parenthood Minnesota, North Dakota, South Dakota engages youth to teach their peers to improve the health of our communities and develop adult leaders who contribute to our society. Here, teens gain leadership and responsible decision-making skills while also learning how to participate more fully in their communities by understanding policy development and the legislative process. Since its inception over ten years ago, the program has graduated more than 500 peer educators who have reached more than 30,000 people through peer education contacts.

Surveys reveal significantly improved sexual health knowledge, healthier attitudes about sexual decision-making, and an increase in conversations with parents/guardians and partners about sexual health issues.

Youth educators provide training in middle and high schools, colleges, faith communities, cultural organizations, parent groups and other community-based organizations. They are multi-lingual, offering presentations and programs in English, Spanish and Hmong. Age-appropriate and culturally-relevant programs promote healthy sexuality and empower individuals to make wise choices. The majority of the programs offered are in schools or social service agencies that serve high-risk populations.

Teens in the program also volunteer in other ways in their communities. They’ve raised awareness of homelessness. They’ve traveled to the state capital, to speak with elected officials. The self-confidence, courage and poise gained through their Planned Parenthood training helped them tell their personal family stories and share how greater awareness and education foster healthier decision-making.

Sarah Stoesz, Planned Parenthood CEO, says, “It’s incredible to watch teens develop a strong sense of self and become mature adults, contributing to their communities and to society. Teens can and will talk with peers about important issues they often aren’t comfortable discussing with adults. We’re giving teens the tools to lead these critical discussions.” ★
Environmental Defense Fund
In support of this organization’s general operations from the Next Generation Fund on behalf of Jeffrey George and Jonathan George. (Washington, D.C.) $5,000

Grantmakers In Health
In support of the 2011 Funding Partner contribution. (Washington, D.C.) $3,000

Guthrie Theater
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. $215,000

Hamm Clinic
In partial fulfillment of a $90,000 grant to support clinical practice training for two interns in the field of professional psychology. $10,000

Karuna-Shechen
In fulfillment of a $45,000 grant to support this organization’s general operations. Karuna-Shechen provides education, medical and social services to individuals in Tibet, Nepal and Bhutan. (New York) $15,000

Marnita’s Table
In partial fulfillment of a $20,000 grant to support this organization’s general operations. $10,000

MicroGrants
In partial fulfillment of a $30,000 grant to support this organization’s small grants program. $10,000

Minneapolis Foundation
In support of the North Minneapolis Relief Fund following the tornado of 2011. $10,000

Minneapolis Institute of Arts
In support of the museum’s Annual Fund. $7,500

Minneapolis Parks Foundation
In support of this organization’s general operations. $10,000
Minnesota Council on Foundations
In support of general operations and annual membership dues for 2011.

Minnesota International Center
In support of this organization’s general operations.

Minnesota Public Radio
In support of this organization’s Annual Fund and in honor of Bill Kling’s retirement.

National Parks Conservation Association
In support of the Yellowstone Conservation Fund’s Wildlife Fellowship program in honor of Edson and Harriet Spencer. (Montana)

The Nature Conservancy
In partial fulfillment of a $30,000 grant to support the Caribbean Program. (Virginia)

Neighborhood Development Center
In partial fulfillment of a $75,000 grant to support the Midtown Global Market Breakthrough Campaign.

Neighborhood Involvement Program
In partial fulfillment of a $50,000 grant to support this organization’s general operations.

Operation HOPE
In partial fulfillment of a $20,000 grant to support this organization’s general operations.

Page Education Foundation
In fulfillment of a $20,000 grant for general operations.

Planned Parenthood Minnesota, North Dakota, South Dakota
In partial fulfillment of a $300,000 grant to support the Youth Education and Development Program.

Plymouth Church Neighborhood Foundation
In partial fulfillment of a $20,000 grant to support Nicollet Square Supportive Services for homeless youth.
**Project Footsteps**
In support this organization’s general operations, including engaging a consultant to develop a program evaluation tool.

$15,000

**Project SUCCESS**
In partial fulfillment of a $30,000 grant to support this organization’s general operations.

$10,000

**Ripple Effect Images**
In partial fulfillment of a $50,000 grant in support of internationally known photographers whose photos are given to benefit non-profit organizations in Latin America and Southeast Asia.

$25,000

**Somali Success School**
In partial fulfillment of a $40,000 grant to support this organization’s general operations, including hiring a local consultant to develop a strategic business plan.

$25,000

**Teach For America, Twin Cities**
In support of this organization’s general operations.

$5,000

**Twin Cities Public Television**
In support of this organization’s Annual Fund.

$5,000

**Twin Cities RISE!**
In partial fulfillment of a $30,000 grant to support this organization’s general operations.

$10,000

**Walk-In Counseling Center**
In support of this organization’s general operations.

$5,000

**Walking Mountains Science School**
In partial fulfillment of a $150,000 grant to support the Walking Mountains Science Center Community Programs. (Colorado)

$50,000

**Washburn Children’s Center**
In partial fulfillment of a $75,000 grant to support this organization’s general operations.

$25,000
WATCH  
In support of this organization’s general operations.  
$5,000

Women’s Foundation of Minnesota  
In partial fulfillment of a $250,000 grant to support the *Minnesota Girls Not for Sale* anti-trafficking initiative.  
$50,000

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

The Youth Foundation  
In support of this organization’s general operations. (Colorado)  
$7,500

Youth Frontiers  
In partial fulfillment of a $60,000 grant to support character retreats for elementary and secondary students and faculty.  
$20,000

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

**TOTAL COMMUNITY FOR 2011**  
$822,250

Note: All organizations are located in Minnesota unless otherwise indicated.
The George Family Foundation 2011 annual report

TOTAL GRANTS PAID 2011= $2,587,071*

*This number includes $88,000 in discretionary grants

LEFT: Girls Inc® at YWCA of Minneapolis delivers life-changing programs inspiring more than 800 girls to be strong, smart, and bold. Girls Inc® programs integrate leadership development, academic success in science and math, financial literacy and healthy decision-making. | RIGHT: Ami Vitale, a photographer for Ripple Effect Images, took this photo of young children carrying water to school in a remote part of Burkina Faso in the desert region near the Malian border. Desperate to educate their children, parents built their own school to fill the lack in their village.
## Financial Summary

### Statement of Financial Position*
December 31, 2011 and 2010

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<tr>
<th></th>
<th>Cost ($)</th>
<th>2011</th>
<th>2010</th>
<th>Market ($)</th>
<th>2011</th>
<th>2010</th>
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<td>2010</td>
<td></td>
<td>2011</td>
<td>2010</td>
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<td>$26,898,079</td>
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<td><strong>TOTAL ASSETS</strong></td>
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<td><strong>NET ASSETS</strong></td>
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<tr>
<td>Total Net Assets</td>
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<td>$45,539,604</td>
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*2011 and 2010 are actual numbers based on the tax return

Emerging preachers gathered for collegial listening with The Beatitudes Society's annual Prophetic Preaching Workshop “Shaping Sermons to Nurture Justice.”
Statement of Activities*  
For the Years Ended December 31, 2011 and 2010

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<thead>
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<td><strong>Revenue</strong></td>
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<td>Interests and Dividends:</td>
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<td>Contributions</td>
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<td><strong>Total Revenue</strong></td>
<td>$9,582,956</td>
<td>$3,119,834</td>
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| **Expenses**          |            |            |
| Taxes Paid            | $76,278    | $98,797    |
| Program Expense       | $47,602    | $57,738    |
| General and Administrative Expense | $43,110    | $54,273    |
| Professional fees     | $275,046   | $300,674   |
| Salaries, Taxes & Benefits | $248,060   | $210,286   |
| Grant Commitments Paid| $2,587,071 | $2,392,710 |
| **Total Expenses**    | $3,277,167 | $3,114,478 |

| **Net Income / (Loss)** | $6,305,789 | $5,356     |
| **Net Assets**          |            |            |
| - Beginning of Year     | $45,539,604 | $45,534,248 |
| - End of Year           | $51,845,393 | $45,539,604 |

* 2011 and 2010 are actual numbers based on the tax return.
We are grateful to be in a position to share with others some of what we have been given, and we are committed to growing individually and collectively through the activities of the foundation.

-Penny and Bill George
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