

2019 ANNUAL REPORT

A legacy of transformative philanthropy

Fostering efforts in mind, body, spirit
and community for 25 years



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Our mission

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

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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.

Founders' Letter

As we complete our first 25 years as a family foundation, we are pleased to share some of our accomplishments and celebrate some of the grantees and leaders who have done so much to advance their respective causes.

Getting started

We created the George Family Foundation in 1994, giving away a substantial portion of our net worth. Our goal was to launch a sustained effort to make a measurable difference during our lifetimes in causes we care about deeply. To leave a legacy for future generations, we made a family foundation and included our sons, Jeff and Jon, as board members, with the hope that they and their heirs will carry on its mission and values long after we have passed from the scene. We also envisioned the Foundation as an opportunity to establish and communicate our family's values for future generations and to enlist our family members to work together to make this world a better place.

In the early years the George Family Foundation was primarily a legal entity we used to build its corpus and from which to write checks to nonprofit organizations we wanted to support. Following Penny's recovery from breast cancer in 1996-97, she took over leadership of the Foundation as president and later as chair, devoting herself to building up and carrying out her passions and Bill's. Since we had no staff, in 1998 we contracted Family Philanthropy Advisors to work with us to create a mission statement, a set of values and the focus areas where we would direct our giving, as well as to recommend potential grantees and to assess their proposals.



Penny P. George / Board Chair
William W. George / Vice Chair

In early 2008 we decided to build our own Foundation staff. In 2010 Gayle Ober joined us, first as executive director and since 2015, as president of the Foundation. She and her team of three dedicated professionals have done a remarkable job of building the Foundation by focusing on its mission, values and focus areas.

Our mission and values

The mission of the George Family Foundation 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. To illustrate, believing in the spiritual reciprocity that exists between those doing the work and those supporting that work enables more trusting and effective relationships to develop.

The four values that are fundamental to our giving are transformational, innovative, holistic and collaborative. Our goal is to support programs and organizations that address society's greatest needs in transformative ways. We support innovative and creative programs that change the status quo. We seek to work "upstream" of problems, trying to prevent as well as repair injustice. Our approach is holistic, looking at the whole person — mind, body and spirit. Finally, we believe in collaboration with our grantees to tackle challenging issues, and on several occasions we have made that possible through specific project grants.

Our focus areas

As a midsized foundation, we know we cannot address all the important issues that are evident in our society. For this reason, we believe focusing our giving is essential in order to have the greatest impact. Based on our personal interests, we initially chose integrative medicine, leadership and community as our three primary focus areas. Later we expanded integrative health & healing to focus more on health, and we added spirituality & mindfulness as an additional focus. As our sons, Jeff and Jon, have become more involved in the Foundation, we added Jeff's commitment to youth development and Jon's to the environment.

"Bill and Penny George are mission-driven leaders who have not followed 'the path,' as Ralph Waldo Emerson advised, but have gone where there is no path and left a trail. There was no real path toward integrative medicine until Penny 'bushwhacked' her way to break trail. There was no course in authentic leadership at Harvard until Bill proved its value. There was no Center for Women's Health at Mayo until Bill and Penny made it happen. Bill and Penny George are trailblazers and pacesetters, and we are the grateful beneficiaries."

Marilyn Carlson Nelson, former Chair and CEO, Carlson

“Penny and Bill George are an inspiration to us. Their work is a reflection of who they are as caring, kind and compassionate pioneers and leaders. Their vision and generosity have impacted how people lead, how integrative health serves individuals and communities, how people find their purpose, and how to support compassionate community building. Their legacy will be a transformative approach to health care, more authentic leaders and organizations, and an inspiration to others to be change agents.”

Charlie Hartwell & Maureen Pelton, Co-Founders, ShiftIt Institute

In our first area of focus, integrative health & healing, we seek to support organizations that take a holistic approach to healing the whole person – to recognize that people are connected in mind, body, spirit and community. Our institutional work in this area has centered around the Allina Health system, where Penny was treated for breast cancer. Over the years we have given Allina over \$9 million from the Foundation and our personal wealth, and we were deeply honored that in 2008 Allina leadership chose to name its efforts the Penny George Institute for Health and Healing.

On the national level, Penny created the Bravewell Collaborative for Integrative Medicine in conjunction with co-founder Christy Mack. More than 20 foundations nationally and individuals joined Bravewell Collaborative to work collectively and to pool our funds to transform medicine by focusing on the health of the whole person. Together they invested and raised \$40 million to change the status quo in how medicine is taught and practiced. Bravewell worked with leading integrative medicine physicians and academic health centers, as well as U.S. and U.K. government organizations, sponsoring conferences, creating leadership programs, providing fellowships, and creating a research infrastructure to demonstrate the effectiveness of integrative approaches to health and wellbeing. More recently, we have worked closely with Mayo Clinic to expand its focus in

integrative health and create the first comprehensive Center for Women’s Health, with joint grants exceeding \$7 million. Over the last 20 years we have also invested \$1.5 million to support the University of Minnesota’s Earl E. Bakken Center for Spirituality & Healing.

In the last few years we have broadened our focus beyond health care institutions. In 2014, we launched the Catalyst Initiative, which focuses on addressing trauma by supporting culturally specific mind-body skills development in under-resourced communities. After three years building the program, we transitioned it to The Minneapolis Foundation, which has the capacity to bring it to scale. So far we have invested \$4.5 million in this effort. In conjunction with the YMCA of the Greater Twin Cities, we created the George Wellbeing Center with a \$2.5 million joint gift.

In the leadership focus area, our goal is to develop and support authentic leaders who are committed to making this world a better place for all. Initially, our efforts focused on fellowships and scholarships for rising leaders at a series of universities and colleges, including Harvard, Duke, Georgia Tech, Carleton and Amherst. Since the foundation inception, we have granted \$6.5 million in fellowship & scholarship awards to more than 900 people. The 176 George Leadership Fellows who are third-year joint degree students at Harvard Business School and Harvard Kennedy School

are worthy of particular note. Following graduation, many of them have gone on to work in Congress, to found important organizations, and to dedicate themselves to working with under-resourced communities and populations.

Our leadership focus has enabled us to fund 1440 Multiversity's new Leadership Center and support its True North Leadership program. We also created the Penny Pilgram George Women's Leadership Initiative for undergraduate women at Duke University and support the Women in Engineering program at Georgia Tech, which graduates more women engineers than any other school in the country.

We have long been committed to our hometown of Minneapolis and its remarkable institutions, from Planned Parenthood to the Guthrie Theater, where Bill is a life director. We have supported local organizations with remarkable leaders like Marnita Schroedl of Marnita's Table, Sarah Stoesz of Planned Parenthood, Amal Abdalla of Somali Success, Carol Byrne at Global Minnesota, and Steve Rothschild of Twin Cities RISE. More recently, we have expanded our community support work to include the Vail Valley, Dallas-Fort Worth, and the San Francisco Bay Area.

Our focus on spirituality was broadened in 2016 to include mindfulness as we supported the work of His Holiness the Dalai Lama through the Mind & Life Institute and helped Tergar International, and its titular head, Yongey Mingyur Rinpoche, to get launched and achieve sustainability. We have also been strong supporters of Jim Wallis' social justice organization Sojourners; Krista Tippett's "On Being Project"; and Eboo Patel's Interfaith Youth Core.

More recently, our work in youth development has led to grants to Project Success, YouthPower365 in the Vail Valley, The Sanneh Foundation and scholarships at Breck School and Global Citizen Year. In the environment, we have given over \$1.4 million through the Foundation and personal gifts to fund the programs of Walking Mountains Science Center and the expansion of its campuses in Avon and Sweetwater, Colorado, as well as supporting the Minneapolis Parks Foundation, National Parks Conservation Association, Eagle Valley Land Trust and the Audubon Society of Northern California.

Looking ahead

As we move into our second quarter-century, we are committed to continuing our work to foster whole-person health care and improve the health of Americans in the communities where they live, and to continue to innovate in developing authentic leaders.

We are gratified with the momentum we have created toward our goals over the last 25 years, and we are grateful that favorable winds are now beginning to blow nationally, and even internationally, to support them.

Over time, our sons, Jeff and Jon, will be taking over greater leadership of the Foundation. The Next Generation Fund is providing an opportunity for them and their spouses, Renee Will George and Jeannette Lager George, M.D., to engage together in substantive grantmaking.

Eventually, we look forward to engaging our four young grandchildren – Dylan, Freeman, Stella and Jade – in the Foundation's work. Most importantly, the George Family Foundation is providing multiple opportunities for us to work together as a family toward goals that truly matter.

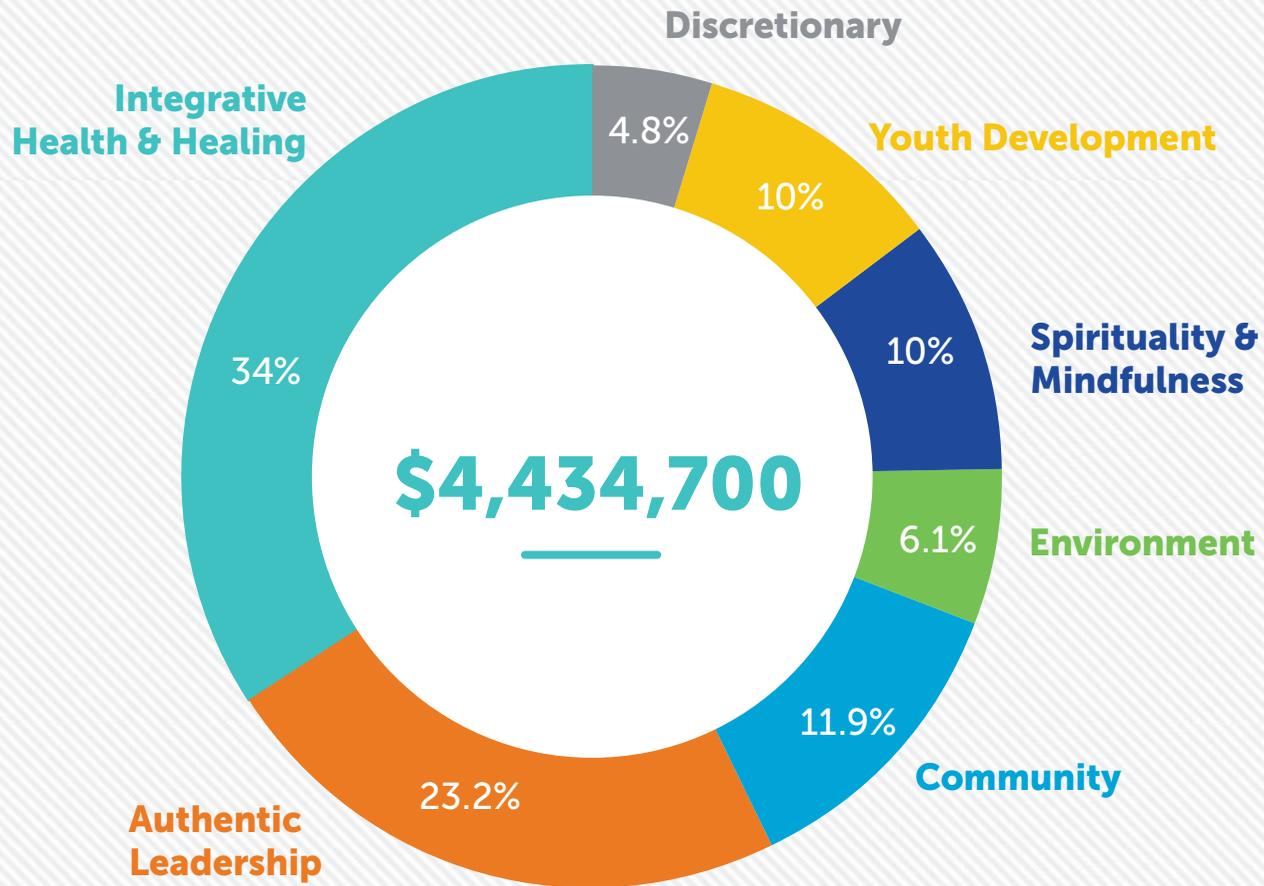
We are also extremely gratified by the remarkable leadership that Foundation President Gayle Ober and her team are bringing our foundation. Staff members Stephen Manuszak, Robin Barker and Katie Jedlicka Sieve are doing an exceptional job in seeking out, evaluating and partnering with grantees to enable them to optimize their impact.

When we created the George Family Foundation in 1994, our dream was to have a significant influence on the issues and organizations we care most about, and to leave a legacy that our sons and their families could carry on long after we are gone. We are excited about what can be accomplished over the next 25 years, when a new generation takes the helm.



Penny and Bill George

2019 Total Grants Paid



Our Focus Areas

Integrative Health & Healing

A central focus of our Foundation is to support the growth of integrative approaches to health and medicine. We seek to fund Minnesota-based organizations and select transformative national programs and initiatives that advance integrative, patient-centered approaches to health and wellbeing in our health care systems and help individuals to improve their own health and wellbeing through mind, body, spirit and community-based approaches.

Authentic Leadership

A goal of our Foundation is to develop authentic leaders who are people of the highest integrity, committed to building and transforming organizations, and who have a deep sense of genuine purpose and are true to their core values. These leaders will flourish in all sectors of society – business, nonprofit and public – with a special focus on leaders from diverse backgrounds.

Community

We seek to give back to the communities that have nurtured our family and others by developing and sustaining vital nonprofit organizations that ensure the livability of our cities. Creating connections within and across the programs we fund is also a priority. We look for programs and organizations that are making a difference in building community in the Twin Cities, the Vail Valley, and other communities connected to George Family Foundation Board members.



The George Family Foundation supports programs, organizations and initiatives that transform lives by changing the systems affecting those lives.

Environment

We would like all people to have a deep value and appreciation for nature and the environment, and to work together to preserve natural spaces for the sake of human beings in both urban and rural areas. To cultivate this, our Foundation supports programs that provide individuals and families the opportunity to participate in outdoor experiences in our national parks and other public spaces in the communities that have nurtured our family.



Spirituality & Mindfulness

Our dream is that American society will one day be characterized by a culture of respect for all faiths and an appreciation of the importance of an inner life nurtured by spiritual practice, compassion and service beyond self. To this end, we support non-sectarian, interfaith and progressive religious organizations that develop authentic leaders who strive to build a more civil and compassionate society and promote interfaith harmony and faith-based social justice, as well as a limited number of national programs that nurture mindfulness, spiritual and contemplative practices.



Youth Development

Our Foundation believes that all youth should have opportunities to realize their full potential and have a positive impact on their families, community and society. To that end, we fund programs that engage with young people from disadvantaged backgrounds over a multi-year time period to develop life skills, build self-esteem and nurture overall wellbeing.



A legacy of transformative philanthropy



The Foundation's grantmaking became more strategic and the first significant grants were made

1994

Penny assumes role of president

1997



GFF begins working with Family Philanthropy Advisors, mapping out the strategic vision for the Foundation

1998

George Leadership Fellows programs established at a variety of colleges and universities tied to the family



First annual report published; 50% of Foundation's funding goes to integrative health & healing programs

1999

First major integrative health & healing grant awarded to Virginia Piper Cancer Institute

2000

40% of all grants go to support integrative health & healing programs



Grant made to Tibetan Community Center to support His Holiness the Dalai Lama's first visit to Minnesota and the creation of a Tibetan Community Center

2001

The Foundation hosted its first integrative health & healing convening, which included 36 medical leaders and philanthropists in Arizona to advance the field



First major grant committed to the Institute for Health & Healing at Abbott Northwestern Hospital (Allina)

2002



Bravewell Collaborative was formed, bringing together the leading physicians in integrative medicine with the philanthropic community to identify barriers and explore solutions

2003

Second major grant committed to Institute for Health & Healing at Abbott

Major grants show the Foundation's commitment to progressive spirituality ("On Being Project," Plymouth Center, Mind & Life Institute, etc.)

2004



Institute for Health & Healing at Abbott renamed Penny George Institute for Health & Healing; first year of leadership grantmaking focus area

2008

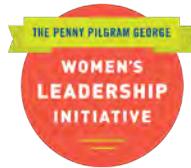
The international financial crisis hits, resulting in a decrease of over 21% for the Foundation's assets; despite this setback, the Foundation decides not to cut back on annual grantmaking

Next Generation Fund formed; Jeff and Jon George are the only advisors

Healthy Communities Partnership (HCP) launched with \$5M grant from Allina



The Foundation hosts an integrative health & healing convening with leaders from across Minnesota, which results in a decision to shift future funding from projects in health care systems to projects in the community



Duke University launches Penny Pilgrim George Women's Leadership Initiative with a major three-year grant

Catalyst Initiative's Healing from Trauma workshop draws over 400 people; the Foundation invests additional funds in local and national faith-based social justice efforts following Trump's election



The Foundation establishes a relationship with Greater Twin Cities YMCA, resulting in a \$2M programmatic grant to launch the George Wellbeing Center

Bill and Penny and the Foundation made a combined \$5M gift to create the Center for Women's Health at Mayo Clinic, a destination for women's health care where patients are not only treated for a specific condition, but also empowered with the tools and knowledge they need to improve their overall health and wellness – mind, body and spirit

2010

2012

2013

2014

2015

2016

2017

2018

2019



George Leadership Fellows program launched at the Center for Spirituality and Healing at the University of Minnesota



\$2M grant given to Mayo Clinic Healthy Living Program



Catalyst Initiative begins with \$3M commitment over three years and a charter to tap into the innate healing capabilities of individuals and communities by funding culturally meaningful mind-body practices

The Foundation names Gayle Ober as president, marking the first time since the Foundation's inception that a professional outside the family serves in this role

Next Generation Fund adds Jeannette Lager George & Renee Will George as advisors

Completing its three-year charter, the Catalyst Initiative transfers to The Minneapolis Foundation with a \$1.5M commitment from the Foundation to support operations for three years



True North Leadership program at 1440 Multiversity hosts inaugural class in October, bringing together 56 people, 12 teaching fellows and four faculty members including Bill George and Gayle Ober

Jeff George becomes board treasurer

Integrative Health & Healing

“The George Family Foundation enjoys a legacy of support to improve the lives of those we serve at Allina Health. Their vision for integrative health options to be embedded in a large nonprofit health system is coming true at Allina Health because of their partnership and strong investments, including investments in time and financial support. In fact, because of the George Family Foundation’s partnership, we have created Whole Person Care as a strategic imperative for our communities. We are stronger and serving more people better due to our long-standing partnership with the George Family Foundation.”

Penny Wheeler, President and CEO, Allina Health



One of the goals of the YMCA George Wellbeing Center is to create accessibility to self-care practices. Participants have the option to drop in when they are able or attend regularly to maintain a wellbeing plan. Group settings provide a great way to maintain a meditation practice. During a group session, instructors guide participants into deeper states of calm as they sit or recline quietly together.

Integrative Health & Healing

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| <p>Academic Collaborative for Integrative Health In fulfillment of a \$45,000 grant to support ACIH's active participation with the National Academy of Medicine's Global Forum on Innovation in Health Professional Education.</p> | <p>\$15,000</p> |
| <p>American Medical Student Association Foundation In partial fulfillment of a \$30,000 grant to support the HEART-IM program.</p> | <p>\$10,000</p> |
| <p>Earl E. Bakken Center for Spirituality & Healing In support of this organization's general operations.</p> | <p>\$25,000</p> |
| <p>Grantmakers In Health In support of the Funding Partner Contribution for 2019.</p> | <p>\$3,450</p> |
| <p>Mayo Clinic In partial fulfillment of a \$2,000,000 grant to launch the Mayo Clinic Center for Women's Health, as well as support of the Healthy Living Program.</p> | <p>\$525,000</p> |
| <p>Minneapolis Pathways In support of this organization's general operations.</p> | <p>\$15,000</p> |
| <p>Penny George Institute Foundation In support of trainings for the Penny George Institute for Health & Healing practitioners.</p> | <p>\$25,000</p> |
| <p>Propel Nonprofits In fulfillment of \$75,000 grant to support the Community Health Fund's Integrative Workplace Project.</p> | <p>\$25,000</p> |
| <p>Tides Center In fulfillment of a \$30,000 grant to support general operations, as well as support for strategic planning for Integrative Medicine for the Underserved (IM4US).</p> | <p>\$40,000</p> |



Explore wellbeing at takingcharge.csh.umn.edu

Staff and volunteers from the Earl E. Bakken Center for Spirituality & Healing greet visitors at their booth at the farmers market held during inauguration week for University of Minnesota President Joan T. A. Gabel.



YMCA's George Wellbeing Center approaches wellbeing as not only an individual journey, but a community journey as well. Working with a coach, individuals can cocreate a wellbeing plan that is personalized to their current life stage and goals, and receive help finding the recommended resources to achieve these goals.

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| <p>The Minneapolis Foundation In partial fulfillment of a \$1,500,000 grant to support the Catalyst Initiative.</p> | <p>\$550,000</p> |
| <p>United States of Care Campaign In support of this organization's general operations.</p> | <p>\$25,000</p> |
| <p>YMCA of the Greater Twin Cities In partial fulfillment of a \$1,000,000 grant for the George Wellbeing Center.</p> | <p>\$250,000</p> |

Total integrative health & healing for 2019

\$1,508,450

Authentic Leadership

“Bill and Penny have been an inspiration for so many years, in leadership, in medicine, and in life, having touched countless lives with their passion, humility and grace. The love and care they bring to their work is a model for all of us who follow in their considerable wake.”

Scott and Joanie Kriens,
Co-creators, 1440 Multiversity



For nearly 25 years, the George Family Foundation has been supporting engineering fellowships at Georgia Tech. In 2019, George Fellows, graduate students in the Industrial Systems Engineering (ISyE) program, received scholarships to supplement their tuition and research projects. The ISyE program at Georgia Tech is ranked #1 in the U.S. and Georgia Tech graduates more female engineers than any other engineering school in the country. In this photo, Dr. Pinar Keskinocak, the William W. George Chair and professor in the H. Milton Stewart School of Industrial and Systems Engineering, works closely with participants of the Center for Health and Humanitarian Systems (CHHS) professional education certificate program in Health & Humanitarian Supply Chain Management (HHSCM).



This is the inaugural class of the Itasca Project's Minnesota Young American Leaders Program. This program shares content and faculty with a program developed by Harvard Business School that develops relationships, teaches rising leaders a new vocabulary around "the commons" and the importance of reinvesting in them, and equips these leaders with additional skills to cross sectors. The Minnesota program is the first in the country to extend and tailor the Harvard Program locally, focused on developing relationships not only within regions, but across the state. The program brought together rising leaders from St. Cloud, Rochester, Fargo-Moorhead and Minneapolis-St. Paul for an intense three-day experience at McNamara Alumni Center at the University of Minnesota.

Authentic Leadership

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| 1440 Foundation Multiversity | \$400,000 |
| In partial fulfillment of a \$1,200,000 grant to support the 1440 Multiversity Leadership Center and the Center's scholarship program. | |
| Beta Psi Foundation | \$30,000 |
| In partial fulfillment of a \$150,000 grant to support scholarships and leadership programs at the Beta Psi Chapter of Sigma Chi at Georgia Tech. | |
| Duke University | \$100,000 |
| In partial fulfillment of a \$300,000 grant to support the Penny Pilgram George Women's Leadership Initiative at Duke University. | |
| Georgia Tech Foundation | \$40,000 |
| In partial fulfillment of a \$200,000 grant to support the George Leadership Fellows program for ISyE graduate students in the area of health systems engineering. | |
| Georgia Tech Foundation | \$30,000 |
| In support of the Women in Engineering Leadership Initiative. | |
| Harvard Business School | \$25,000 |
| In partial fulfillment of a \$125,000 grant to support the George Leadership Fellows program in the Harvard Business School/Harvard Kennedy School joint degree program. | |
| Harvard University John F. Kennedy School of Government | \$145,000 |
| In partial fulfillment of a \$675,000 grant to support the George Leadership Fellows program in the Harvard Business School/Harvard Kennedy School joint degree program, as well as support for two additional fellows. | |

**Humphrey School of Public Affairs/
University of Minnesota Foundation**

\$25,000

In partial fulfillment of a \$75,000 grant to support scholarships for women and minority leaders in the nonprofit sector to participate in the Policy Fellows program in the Center for the Study of Politics and Governance.

Saint Paul & Minnesota Foundation

\$35,000

In support of the Itasca Project's Minnesota Young American Leaders Program.

Sigma Chi Foundation

\$100,000

In fulfillment of a \$500,000 grant to support *Sigma Chi U*, a web-based multimedia educational learning program for undergraduate Sigma Chi Chapters.

Teach For All

\$30,000

In partial fulfillment of a \$60,000 grant to support the Collective Leadership Academy.

The Carter Center

\$50,000

In partial fulfillment of a \$250,000 grant to support the Center's Education Internship Program.

Women's Foundation of Minnesota

\$20,000

In partial fulfillment of a \$40,000 grant to support the Wenda Weekes Moore Internship and the Dr. Reatha Clark King Fellowship.



Total authentic leadership for 2019

\$1,030,000

Beta Psi Chapter members participate in a challenge where they are given a set of resources and must strategize and execute a way to incorporate as many of the given resources as possible to create the tallest freestanding structure they can within a fixed time frame.



Community

“The Somali Success School was created by former immigrants who wanted to connect new refugees to training and support services leading to self-sufficiency and full citizenship. Our programs were successful from the start and had quantifiable outcomes. However, as a new, small nonprofit led by immigrants, we struggled in competing for funding with major local nonprofits. The George Family Foundation’s (GFF) support allowed us to provide services to a growing number of recipients each year. Your support also inspired other funders to match your funding yearly, even during challenging financial times.

Most of all, the GFF gave me and our staff the priceless emotional validation we needed to persevere and eventually grow to be the largest Somali-based organization in Minneapolis. We feel heard and valued by the leadership at the GFF. As a female and an immigrant servant-leader, I cannot stress enough the importance of having GFF believe in us and our work.”

Amal Abdalla, President and CEO, Somali Success School

Participants from Planned Parenthood North Central States’ Twin Cities Teen Council program take part in a team-building activity. Teen Council is a peer education program for teens ages 13-19 that focuses on pregnancy and STI prevention, building healthy relationships and leadership development.



Community

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| Children’s HeartLink In support of this organization’s general operations to help train doctors and nurses in select underserved parts of the world to diagnose and treat children with heart disease. | \$15,000 |
| Duke University In fulfillment of a \$100,000 grant to support the Trinity College Annual Fund for Financial Aid program. | \$20,000 |
| Fund for Women’s Equality In support of this organization’s general operations. | \$25,000 |
| Global Minnesota In support of this organization’s general operations. | \$15,000 |
| Guthrie Theater In support of the Theater’s 2019-2020 annual fund. | \$25,000 |
| Karuna-Shechen In honor of Matthieu Ricard and to support Shechen Clinics in Nepal, India and Bhutan. | \$25,000 |
| Marnita’s Table In partial fulfillment of a \$100,000 grant to support this organization’s general operations. | \$50,000 |
| Minneapolis Institute of Arts In support of the Museum’s annual fund. | \$15,000 |
| Minnesota Council on Foundations In support of the Minnesota Census Mobilization Partnership in preparing Minnesota for the 2020 census. | \$10,000 |
| Minnesota Historical Society In fulfillment of a \$100,000 grant to support the American Galleries “Our Home: Native Minnesota” exhibit. | \$50,000 |



Bonton Farms employee Doris harvests eggs for the neighborhood farm, which provides access to fresh food and creates jobs.



The Market at Bonton Farms is a neighborhood fresh food market and café that provides access to fresh foods. Some of the food that is sold comes from Bonton Farms’ neighborhood farm.



◀ Hmong S.T.A.R. participants at Planned Parenthood North Central States attend a clinic tour at a local Planned Parenthood health center. Hmong S.T.A.R. is a multisession, culturally responsive peer education program that utilizes evidence-based curriculum, which is informed by community needs.

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| Minnesota Orchestra In honor of the leadership of Marilyn Carlson Nelson and Paula DeCosse. | \$15,000 |
| Minnesota Public Radio In support of this organization's annual fund. | \$15,000 |
| North Texas Food Bank In support of this organization's general operations. | \$12,500 |
| Planned Parenthood of Greater Texas In fulfillment of a \$20,000 grant to support reproductive health education for middle and high school students in Dallas County. | \$10,000 |
| Planned Parenthood Minnesota, North Dakota, South Dakota (a subsidiary of Planned Parenthood North Central States) In partial fulfillment of a \$225,000 grant to support the Peer Education in Minnesota: Building Youth Leaders for a Healthier Future program. | \$75,000 |
| Relationships First In support of this organization's general operations. | \$25,000 |

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| Somali Success School In partial fulfillment of a \$50,000 grant to support this organization's general operations. | \$25,000 |
| The Dallas Foundation In support of general operations for Bonton Farms. | \$15,000 |
| Twin Cities Public Television In support of this organization's annual fund. | \$15,000 |
| University of St. Thomas In support of this organization's annual fund. | \$15,000 |
| VoteRunLead In support of ongoing efforts to build diverse, authentic women leaders in Minnesota and Texas. | \$15,000 |
| Walk-In Counseling Center In support of this organization's general operations. | \$15,000 |
| Women Moving Millions In partial fulfillment of a \$50,000 grant to support this organization's general operations. | \$25,000 |

Total community for 2019

\$527,500

Environment

“For more than a century, the National Parks Conservation Association has served as the fearless defender of America’s national parks. Through the George Family Foundation’s generous support of our National Parks Legal Defense Fund, we will continue to defend communities and parks against unprecedented threats. We will fight for a future that brings our grandchildren the joy of seeing grizzly bears in Yellowstone National Park or brown bears fishing for salmon in Katmai National Park. And we will stand in unwavering defense of laws including the Endangered Species Act, which returned bald eagles to our national parks, and the Antiquities Act, which gave us national treasures including the Grand Canyon, Bears Ears and the Statue of Liberty.”

Theresa Pierno, President and CEO,
National Parks Conservation Association



Minnesota volunteers and youth crew members with the National Parks Conservation Association plant trees along the Rat Root River, a tributary to Voyageurs National Park, to stem erosion and contribute to water quality in the park. (Credit: Eric Miller)



Volunteers for the National Parks Conservation Association take down a fence to allow antelopes to roam at Yellowstone National Park.

Environment

| | |
|--|-----------------|
| Audubon California In support of the San Francisco Bay Area programs. | \$15,000 |
| Betty Ford Alpine Gardens In support of this organization's general operations. | \$10,000 |
| Big City Mountaineers In fulfillment of a \$20,000 grant to support scholarships for girls to attend the Boundary Waters expeditions and camps program. | \$10,000 |
| Conservation Corps Minnesota & Iowa In fulfillment of a \$20,000 grant to support the Conservation Corps Minnesota: Summer Youth Corps program. | \$10,000 |
| Eagle Valley Land Trust In fulfillment of a \$70,000 grant to support the Land & Rivers Fund, as well as support of this organization's general operations to help ensure the future of Eagle County, including scenic vistas, wildlife habitat and open ranchlands. | \$50,000 |
| Minneapolis Parks Foundation In partial fulfillment of a \$45,000 grant to support this organization's general operations. | \$15,000 |
| Minnesota Landscape Arboretum Foundation In fulfillment of a \$20,000 grant to support youth environmental education programs. | \$10,000 |
| National Parks Conservation Association In partial fulfillment of a \$60,000 grant to support general operations and the Legal Defense Fund, as well as support of NPCA's Yellowstone National Park program. | \$45,000 |

| | |
|--|-----------------|
| Ripple Effect Images In fulfillment of a \$90,000 grant to support this organization's general operations. | \$30,000 |
| The Nature Conservancy In partial fulfillment of a \$60,000 grant to support the Minnesota Freshwater Program. | \$20,000 |
| Voyageur Outward Bound School In fulfillment of a \$20,000 grant to support the Twin Cities Center. | \$10,000 |
| Walking Mountains Science Center In partial fulfillment of a \$60,000 grant to support the Walking Mountains Science Center's community programs. | \$30,000 |
| Wilderness Inquiry In fulfillment of a \$30,000 grant to support Project FIT: Building Healthy Families and Thriving Communities through the Shared Outdoor Adventure program. | \$15,000 |



Total environment for 2019

\$270,000



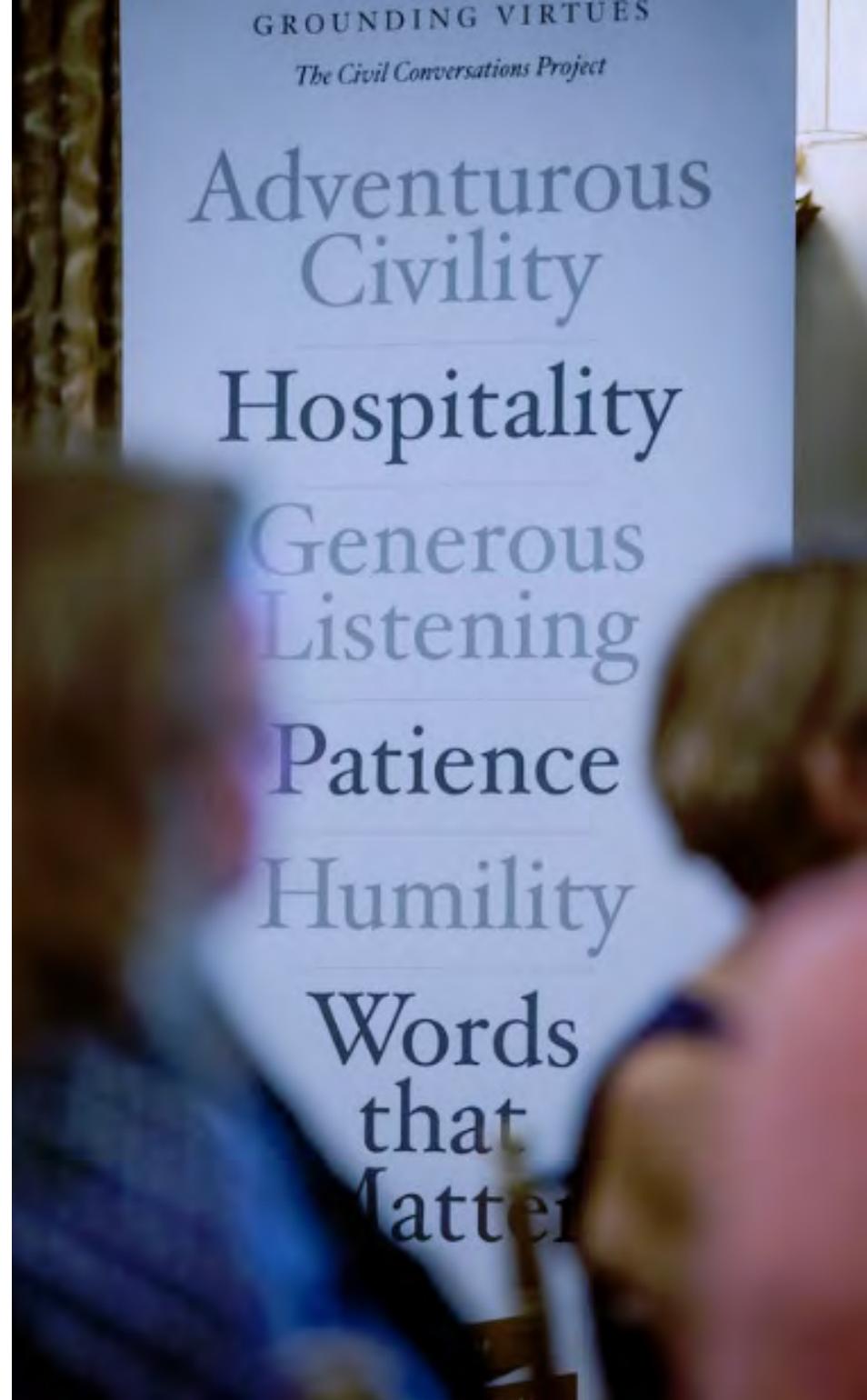
Community members in the Vail Valley in Colorado attend Walking Mountains Science Center Speaker Series, where they learn about edible and medicinal plants in the region.

Spirituality & Mindfulness

“We find ourselves in one of the most pivotal moments in U.S. history. The health and sustainability of our democracy is at stake, testing the resiliency of our most foundational institutions. Our nation’s checks and balances, cultural ethos and moral compass are being tested more than they have in decades. And we don’t know how this crisis is going to turn out.

Sojourners is so grateful for the George Family Foundation’s support, which is strengthening our ability to respond, proactively and reactively, to the major threats and opportunities facing our nation. We are working to: offer a positive vision for our nation; support people in their internal transformation; convene diverse partners; develop values-based messaging; encourage nonpartisan civic participation; mobilize faith-inspired action for justice; protect voting rights; address racism and xenophobia; and protect our planet.”

Jim Wallis, Founder, President and Editor-in-Chief, Sojourners



Spirituality & Mindfulness

| | |
|--|----------|
| Auburn Theological Seminary In support of this organization's general operations. | \$50,000 |
| Compassion & Choices In partial fulfillment of a \$100,000 grant to support general operations and educational efforts to help ensure everyone in Minnesota and across America has the options they need to die in peace and with dignity. | \$50,000 |
| End in Mind Project In partial fulfillment of a \$75,000 grant to support general operations. | \$25,000 |
| Faith in Public Life In fulfillment of a \$50,000 grant to support the <i>Understanding and Countering the Language of Violence: Building Interfaith Networks of Solidarity with Religious Minorities and Immigrants</i> project. | \$25,000 |
| Interfaith Youth Core (IFYC) In partial fulfillment of a \$150,000 grant to support IFYC's Alumni Relations Network. | \$50,000 |
| ISAIAH In support of the Greater Than Fear program. | \$20,000 |
| Mind & Life Institute In support of this organization's general operations. | \$25,000 |



Cathy Wurzer and singer Jearlyn Steele on stage at Mystic Lake Center in Shakopee for a public End in Mind Project gathering. More than 350 people attended the event to think and talk about choices for living and dying well.

◀ The On Being Project's grounding virtues are visually represented at a gathering in Barrington, Illinois. The community is partnering with On Being's Civil Conversations Project to use its resources to frame and inform their "Year of Courageous Conversations" – a series of speakers, gatherings and community engagement to learn how to better hear, share and understand different lived experiences.



On Being host Krista Tippett interviews Shane Claiborne and Ambassador Omar Saif Ghobash at Congregation Rodeph Shalom in Philadelphia. This conversation took place at the invitation of Interfaith Philadelphia as a capstone event of their yearlong initiative modeled after the work of On Being's Civil Conversations Project. Interfaith Philadelphia used On Being's Grounding Virtues and Better Conversations Guide to train facilitators on organizing and leading civil conversations in their congregations, workplaces and communities. This is one example of how the On Being Project is increasingly accompanying individuals, organizations and communities as they seek to engage the pressing moral and ethical issues of our time in the context of community and relationship. Photo: Ginger Fox Photography

| | |
|---|------------------|
| Sojourners | \$50,000 |
| In fulfillment of a \$100,000 grant to support this organization's general operations. | |
| Tergar International | \$50,000 |
| In partial fulfillment of a \$90,000 grant to support the Joy of Living program expansion, as well as support for general operations. | |
| The On Being Project | \$100,000 |
| In fulfillment of a \$300,000 grant to support this organization's Civil Conversations Project. | |



Total spirituality & mindfulness for 2019

\$445,000

Youth Development

“We launched Project Success in 1994 because we saw an opportunity to help more young people thrive in life and prepare for their futures. Over 26 years, we have established a proven model of innovative experience learning that has transformed thousands of students’ lives.

The George Family Foundation has been a key partner in our growth and impact since 2007. In that time, Project Success has grown from serving 7,000 students to nearly 16,000 and has deepened our programs for all students, taking action each day to help students connect to their purpose. We are grateful for the support from the Foundation over the last 13 years and the confidence in our program that it represents!”

Adrienne Diercks, Founder and Executive Director, Project Success



Teaching artist Annamarie Arai plays alongside her second and third grade pre-orchestra violin students in their very first performance at Enriching Lives through Music’s winter concert at the Showcase Theater in Marin Center. These first-year Enriching Lives through Music students are learning how to comfortably hold their instruments and maintain the proper stance as they perform for a full house of family, friends and fans.

During their 12-month paid internship at Café Momentum, interns work side by side with established chefs and service leaders. Shown here, Chef Jordan and Intern Kewan discuss plans for dinner service. Many interns have gone on to other culinary positions, and several have enrolled in the El Centro College culinary arts program.





Students at YouthPower365's after-school enrichment program work in the woodshop, delving deep into their creative minds as they create a project and practice math skills to see the project come to fruition.

Youth Development

| | |
|---|-----------------|
| <p>Beacon Interfaith Housing Collaborative In support of Nicollet Square Supportive Services for homeless youth aging out of the foster care system.</p> | \$15,000 |
| <p>Breck School In partial fulfillment of a \$100,000 grant to provide funds for multiple Breck families to host international exchange students.</p> | \$20,000 |
| <p>Breck School In partial fulfillment of a \$100,000 grant to support scholarships for underserved students on behalf of the Next Generation Fund.</p> | \$20,000 |
| <p>Café Momentum In fulfillment of a \$20,000 grant to support this organization's general operations.</p> | \$10,000 |
| <p>Carleton College In support of the George International Fellows program, which provides need-based financial aid for international students.</p> | \$10,000 |
| <p>College Possible In partial fulfillment of a \$75,000 grant to support the programming costs for promising low-income youth in Minnesota to gain admission to college.</p> | \$25,000 |
| <p>Cookie Cart In partial fulfillment of a \$20,000 grant to support this organization's general operations.</p> | \$10,000 |
| <p>Destiny Arts Center In partial fulfillment of a \$45,000 grant to support this organization's general operations on behalf of the Next Generation Fund.</p> | \$15,000 |
| <p>Education Opens Doors In support of this organization's general operations.</p> | \$12,500 |
| <p>Enriching Lives through Music In fulfillment of a \$20,000 grant to support this organization's general operations on behalf of the Next Generation Fund.</p> | \$10,000 |

| | | | |
|--|-----------------|---|-----------------|
| Girl Scouts of Northeast Texas In fulfillment of a \$20,000 grant to support programming for girls at the STEM Center for Excellence on behalf of the Next Generation Fund. | \$10,000 | Project SUCCESS In partial fulfillment of a \$75,000 grant to support this organization's general operations. | \$25,000 |
| Global Citizen Year In partial fulfillment of a \$100,000 grant to support participants with financial need who come from Minnesota or Dallas, Texas. | \$34,000 | The Loppet Foundation In partial fulfillment of a \$50,000 grant to support the Loppet High School Adventures programming. | \$25,000 |
| Inward Bound Mindfulness Education In fulfillment of a \$20,000 grant to support scholarships for the Northern Teen Retreat on behalf of the Next Generation Fund. | \$10,000 | The Sanneh Foundation In fulfillment of a \$60,000 grant to support this organization's general operations and in fulfillment of a \$60,000 grant to support capacity building and program expansion. | \$50,000 |
| Junior Players Dallas In support of general operations for Junior Players Free Arts Education program on behalf of the Next Generation Fund. | \$5,000 | Urban Strategies, Inc. In support of Green Garden Bakery. | \$10,000 |
| Juxtaposition Arts In fulfillment of a \$20,000 grant to support this organization's general operations on behalf of the Next Generation Fund. | \$10,000 | Youth Frontiers In support of this organization's general operations. | \$20,000 |
| MacPhail Center for Music In fulfillment of a \$30,000 grant to support the North Minneapolis After-School Strings Program and the MacPhail Youth Orchestra on behalf of the Next Generation Fund. | \$15,000 | YouthPower365 In partial fulfillment of a \$90,000 grant to support this organization's general operations. | \$30,000 |
| Mindful Life Project In fulfillment of a \$30,000 grant to support this organization's general operations on behalf of the Next Generation Fund. | \$15,000 | YWCA Minneapolis In fulfillment of a \$60,000 grant to support the Girls Incorporated program. | \$20,000 |
| Minneapolis College of Art and Design In fulfillment of a \$10,000 grant to support of Minneapolis College of Art & Design's Summer Youth Scholarship program on behalf of the Next Generation Fund. | \$5,000 | | |
| Page Education Foundation In fulfillment of a \$30,000 grant to support this organization's general operations. | \$10,000 | | |



Total youth development for 2019

\$441,500



Sojourners' Director of Campaigns and Mobilizing Sandy Ovalle speaks at a press conference on behalf of Jeanette Vizguerra, who had been taking sanctuary in a church in Denver. The week Vizguerra was scheduled to go before ICE, Sojourners participated in the press conference before delivering a national petition to ICE on her behalf. Sojourners recognized Vizguerra as a movement leader during their 2018 summit for her work on behalf of immigrants rights.

Financial Summary

Statement of Financial Position

December 31, 2019 and 2018

MARKET (\$)

| ASSETS | 2019 | 2018 |
|---|--------------|--------------|
| Investments | \$61,805,012 | \$56,714,674 |
| Program Related Investment (net of imputed interest) | \$505,500 | \$621,500 |
| Fixed Assets (net of depreciation) | \$1,007 | \$1,555 |
| Total Assets | \$62,311,519 | \$57,337,729 |
| LIABILITIES & NET ASSETS | | |
| Liabilities | \$ – | \$ – |
| Net Assets | \$62,311,519 | \$57,337,729 |
| Total Liabilities & Net Assets | \$62,311,519 | \$57,337,729 |

High school students participating in a new program at The Loppet Foundation called “Ski Ambassadors” pose with their supervisors. In this program students receive training to ski the trails in Theodore Wirth Regional Park and have positive, educational interactions with park patrons by displaying ski passes, trail conditions, trail maps, and more. This establishes them as leaders in the park. ▶



Statement of Activities

For the years ended December 31, 2019 and 2018

| REVENUE | 2019 | 2018 |
|---------------------------------------|---------------------|----------------------|
| Interest & Dividends | \$1,166,041 | \$1,178,117 |
| Realized Gain/(Loss) on Investments | \$748,286 | \$2,157,905 |
| Unrealized Gain/(Loss) on Investments | \$8,200,144 | \$(7,162,948) |
| Contributions | \$287,560 | \$957,039 |
| Other Income | \$633 | \$6,234 |
| Total Revenue | \$10,402,664 | \$(2,863,653) |
| | | |
| EXPENSES | | |
| Grant Commitments Paid | \$4,434,700 | \$4,730,950 |
| Program Expense | \$109,354 | \$146,970 |
| Operating Expense | \$683,110 | \$544,601 |
| Non-operating Expense | \$201,710 | \$352,485 |
| Total Expenses | \$5,428,874 | \$5,775,006 |
| | | |
| Net Income/(Loss) | \$4,973,790 | \$(8,638,659) |
| Net Assets—Beginning of Year | \$57,337,729 | \$65,976,388 |
| | | |
| Net Assets—End of Year | \$62,311,519 | \$57,337,729 |

Conservation Corps Minnesota & Iowa’s Summer Youth Corps crews jumped for joy in Gooseberry Falls State Park, celebrating the success of a weeklong staircase building project! Each year the Summer Youth Corps program unplugs 90 youth, ages 15 to 18, from modern technology for an eight-week outdoor experience. Youth earn a stipend and lodging throughout Minnesota as they engage in service-learning projects that restore and protect natural resources.



“Our hope is that the legacy of our family foundation allows our future generations to work together on things that they care about.”

Penny & Bill George



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