

values

ethics

character

spiritual  
reciprocity



building  
communities

sharing the  
blessings

making a  
difference

working  
collaboratively





*We are grateful*

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## LETTER FROM THE PRESIDENT

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The George Family Foundation continued in 2004 its commitment to fund innovative programs in education, spirituality and integrative medicine. Three grants in particular stand out as examples of excellence and impact in these arenas.

This is the fourth year we have funded Minnesota Public Radio's "Speaking of Faith", hosted by Krista Tippett. In that time the list of stations airing the show has grown to 115 across the nation. Thus, even greater numbers of listeners are in a position to hear - and through an active website - react to thoughtful dialogues on sensitive topics in the

realm of faith and religion. Krista's interviews are respectful, probing and reflective, and they encourage us to exhibit those values in the religiously pluralistic society in which we live.

The foundation has made a multi-year grant to Plymouth Congregational Church, an inner-city church in Minneapolis, Minnesota, to help launch a center for progressive liberal theology and studies. This center, as yet unnamed, will also provide a home for the active inter-faith dialogue program that links churches across the Twin Cities. The grant is a validation of both the congregation itself and of its minister, Jim Gertmenian.

A third grant, to the Mind and Life Institute, will continue to make possible an ongoing series of dialogues between Western scientists of the mind and emotions and a group of Buddhist scholars, including His Holiness the Dalai Lama. One of those dialogues is described in the fascinating book "Destructive Emotions" edited by Daniel Goleman. The implications of these dialogues and the research that has been stimulated by them are far-reaching in their potential to benefit the health and well-being of our society.

Our commitment to integrative medicine is reflected in a recent grant to convene a group of national leaders in pediatric integrative medicine to identify strategies to move that field forward, much as our original grant to convene a similar group

## APPLYING TO THE GEORGE FAMILY FOUNDATION

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*As of December 15th, 2003 the Foundation does not accept unsolicited proposals.*

*Invited applicants are encouraged to submit a letter of inquiry or to discuss their request with staff before submitting an application.*

One copy of the proposal should be submitted which includes the following:

- Complete George Family Foundation Grant Application Cover Page.
- Brief description of mission, history, background and capabilities of organization.
- Purpose of project or program: *What will be accomplished?*
- Statement of need: *What problems will be addressed and solved?*
- Relevance: *How does the project relate to the interests of the Foundation?*
- Implementation: *How will the project be carried out? Workplan? Timelines?*
- Collaboration: *How will the applicant work with others? What are major sources of support?*
- Future Funding: *How will the program be sustained in the future?*
- Staff: *What are the capabilities of those responsible for the project?*
- Evaluation Plan: *How will results be evaluated?*
- George Family Foundation Support: *How will this grant be used?*

Please attach the following additional information:

- Copy of IRS letter certifying your 501(c)(3) tax-exempt status.
- Copy of organization's budget for current fiscal year.
- Copy of latest audit of financial statement.
- Listing of Board of Directors and affiliations.
- Listing of current funders.

Proposals should be received by May 30 or October 30

1818 Oliver Avenue South

Minneapolis, Minnesota 55405

612 377-8400 *phone*

612 377-8407 *fax*

## FINANCIAL SUMMARY

### STATEMENT OF HOLDINGS December 31, 2004 and 2003

	MARKET		COST	
	2004	2003	2004	2003
ASSETS:				
Investments:				
Stocks	\$ 36,173,910	\$ 29,792,805	\$ 30,229,579	\$ 19,464,627
Cash and Cash Equivalents	\$ 3,596,826	\$ 4,255,081	\$ 3,596,826	\$ 4,255,081
Total Investments	<u>\$ 39,770,736</u>	<u>\$ 34,047,886</u>	<u>\$ 33,826,405</u>	<u>\$ 23,719,708</u>
Principal arising from cash transactions			<u>\$ 33,826,405</u>	<u>\$ 23,719,708</u>

### STATEMENT OF RECEIPTS AND DISBURSEMENTS Years ended December 31, 2004 and 2003

	2004	2003
RECEIPTS:		
Dividends	\$ 539,925	\$ 191,129
Interest	\$ 32,277	\$ 28,088
Net gain/loss on disposition of investments	\$ 9,266,580	\$ 5,283,299
Contributions	\$ 2,663,506	\$ 2,755,158
Other Income	\$ 10,000	\$ —
Total Receipts	<u>\$ 12,512,288</u>	<u>\$ 8,257,674</u>
DISBURSEMENTS:		
Taxes paid	\$ 241,530	\$ 66,991
General and administrative expenses	\$ 48,632	\$ 31,060
Program expense	\$ 47,500	\$ —
Professional fees	\$ 363,796	\$ 245,805
Charitable contributions	\$ 1,704,133	\$ 1,670,619
Total Disbursements	<u>\$ 2,405,591</u>	<u>\$ 2,014,475</u>
Net decrease in principal for the year	\$ 10,106,697	\$ 6,243,199
Adjustment to principal	\$ —	\$ —
Principal at beginning of year	\$ 23,719,708	\$ 17,476,509
Principal at end of year	<u>\$ 33,826,405</u>	<u>\$ 23,719,708</u>

of non-pediatric medical leaders did in April 2001. From that convening came the Bravewell Collaborative, which we also continue to fund and support through active involvement and leadership.

It continues to be a growth experience to learn about the intellectual, social and financial capital that is being brought to bear on issues in the areas our foundation is also pursuing. We are linked with others who are equally passionate about making change happen, about having philanthropy fulfill its potential as the “passing gear of society”. We hope you enjoy reading this report and welcome your reactions.



Penny George  
President  
The George Family Foundation

## OUR INTERESTS

### Educational Opportunity

*Fellowships for individuals with potential to positively impact society and to gain a deeper understanding of the world and its diverse cultures.*

### Integrative Medicine

*Programs and initiatives that promote an integrated approach to healing mind, body, heart and spirit.*

### Youth Development

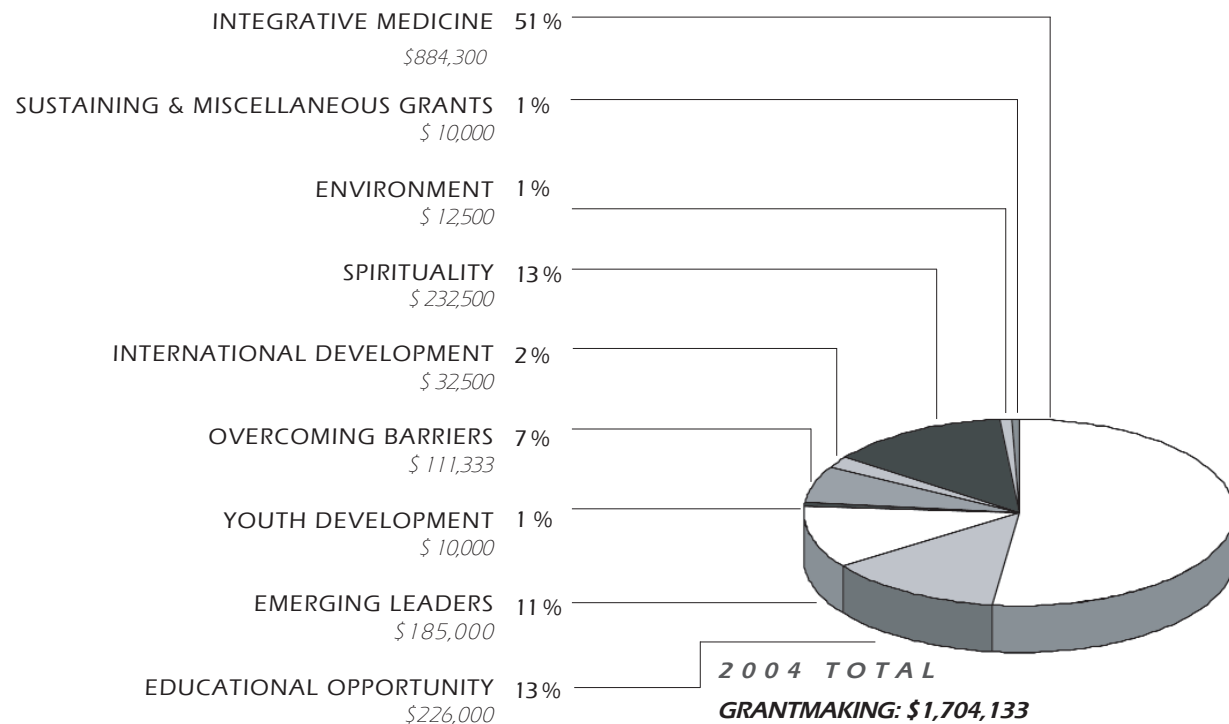
*Programs focused on leadership development and mentoring.*

### Overcoming Barriers

*Programs that help women and people of color overcome societal barriers and realize their full potential.*

### Spirituality

*Programs which enrich the spiritual lives of individuals, families and communities.*



## SUSTAINING AND MISCELLANEOUS

### Duke University

*In support of Duke University's 2004 Annual Fund.*

\$5,000

### The Guthrie Theater

*In support of the Guthrie's Annual Fund 2004-05.*

\$2,500

### The Minneapolis Institute of Arts

*General operating support for this art museum.*

\$1,500

### Rotary Club

*In support of the Minneapolis Rotary Community Foundation fund drive.*

\$1,000

### **Total Sustaining and Miscellaneous**

**\$10,000**

## EMERGING LEADERS

Institute for Global Ethics <i>Start-up funding for a Center for Moral Courage.</i>	\$30,000
Sigma Chi Foundation <i>In partial fulfillment of a \$600,000 pledge to support Sigma Chi's Horizons Leadership Project.</i>	\$150,000
Vail Leadership Institute <i>In fulfillment of a \$10,000 grant for general operating support.</i>	\$5,000
<b>Total Emerging Leaders</b>	<b>\$185,000</b>

## ENVIRONMENT

Audubon Center of the North Woods <i>In fulfillment of a \$5,000 pledge in support of this environmental learning center.</i>	\$2,500
Eagle Valley Land Trust <i>General operating support for this Colorado land conservation organization.</i>	\$10,000
<b>Total Environment</b>	<b>\$12,500</b>



*The Lighthouse Academy is a charter high school teaching immigrant and refugee youth the knowledge and skills to succeed.*

## EDUCATION & EDUCATIONAL OPPORTUNITIES

The Bakken <i>In partial fulfillment of a \$50,000 pledge in support of this center for education about the role of electricity and magnetism in the life sciences and medicine.</i>	\$10,000
Fitness Forward <i>In partial fulfillment of a \$30,000 pledge for general operating support for this community based healthcare program that promotes healthful living for youth.</i>	\$15,000
Gore Range Natural Science School <i>In partial fulfillment of a \$20,000 pledge in support of this organization providing environmental education to youth in Eagle County, Colorado.</i>	\$10,000
Lighthouse Academy of Nations <i>In support of this charter school for immigrant and refugee youth.</i>	\$15,000
The One Percent Club <i>General operating support to facilitate recruitment of new members who pledge to give 1% of their networth towards charitable causes each year.</i>	\$1,000
Page Education Foundation <i>In support of the scholarship program for students of color, tutoring and mentoring services.</i>	\$5,000
Seed Academy/Harvest Preparatory School <i>In partial fulfillment of a \$15,000 pledge for general operating support for this inner-city school.</i>	\$5,000
<b>Sub-Total Education and Educational Opportunities</b>	<b>\$61,000</b>

## GEORGE FELLOWS PROGRAM

The purpose of the George Fellows Program is to encourage promising students as they pursue advanced degrees. Preference is given to students who demonstrate exceptional academic potential and financial need. The majority of these fellowships go to minority students and international students from developing countries.

Amherst College <i>In partial fulfillment of a \$150,000 pledge for the George International Scholarships.</i>	\$15,000
Carleton College <i>In partial fulfillment of a \$150,000 pledge to support the George International Scholarships.</i>	\$15,000
The Carter Center <i>In partial fulfillment of a \$125,000 pledge in support of the Carter Center Education and Internship Program.</i>	\$25,000
Georgia Institute of Technology <i>In partial fulfillment of a \$200,000 pledge for the George Fellows Fund in Industrial Systems and Engineering.</i>	\$10,000
Georgia Institute of Technology <i>In partial fulfillment of a \$200,000 pledge for the George Fellows Fund in Bioengineering and Bioscience.</i>	\$20,000
Hamm Clinic <i>In fulfillment of a \$60,000 pledge for minority doctoral-level psychology students.</i>	\$20,000
Harvard Business School <i>In partial fulfillment of a \$280,000 pledge for the George International Scholarships.</i>	\$30,000
Macalester College <i>In partial fulfillment of a \$145,000 pledge for the George International Scholarship.</i>	\$15,000



Krista Tippett conceived the idea of “Speaking of Faith” — a public radio program to bring a wide range of thoughtful religious voices into American life.

## SPIRITUALITY

Episcopal Community Services <i>Sustaining grant for this social service organization.</i>	\$5,000
House of Prayer <i>General operating support.</i>	\$2,500
Mind and Life Institute <i>In partial fulfillment of a \$150,000 pledge to support scientific dialogue between his Holiness the Dalai Lama and Western scientists.</i>	\$30,000
Minnesota Public Radio <i>In partial fulfillment of a \$50,000 pledge for support of the national program, “Speaking of Faith”.</i>	\$20,000
Plymouth Congregational Church <i>In partial fulfillment of a \$500,000 pledge to help launch a center that will support progressive Christian theology and inter-faith dialogue.</i>	\$100,000
United Theological Seminary <i>In partial fulfillment of a \$225,000 pledge in support of the “Spiritual Journeys - Supporting Spirituality and Wholeness in Leadership” program.</i>	\$75,000
<b>Total Spirituality</b>	<b>\$232,500</b>



W.A.T.C.H. \$3,000  
*General operating support for initiatives designed to improve the criminal justice system's handling of cases of domestic violence and sexual assault.*

**Total Overcoming Barriers \$111,333**

**INTERNATIONAL**

CARE \$2,500  
*In support of CARE's international relief and development efforts.*

Minnesota International Center \$5,000  
*General operating support for international and cultural awareness programs.*

Opportunity International \$20,000  
*In partial fulfillment of a \$60,000 pledge for general operating support for micro-lending programs in developing countries.*

World Childhood Foundation \$5,000  
*General operating support for this international organization serving children.*

**Total International \$32,500**

University of St. Thomas \$15,000  
*In fulfillment of \$45,000 pledge for exceptional minority master's and doctoral-level students pursuing degrees in the mental health field.*

**Total George Fellows Program \$165,000**

**GRAND TOTAL EDUCATION & EDUCATIONAL OPPORTUNITIES \$226,000**



*The Institute for Health and Healing's mission is to enhance the health of individuals, families and communities by stimulating and supporting integrative medicines at Abbott Northwestern Hospital*

**INTEGRATIVE MEDICINE**

Abbott Northwestern Hospital \$200,000  
*In partial fulfillment of a \$1 million pledge supporting the Institute for Health and Healing.*

Center for Mind-Body Medicine \$50,000  
*In support of the training program, CancerGuides.*

Children's Hospitals and Clinics Foundation \$38,300  
*In support of the development and convening of pediatric integrative medicine national leaders to identify strategies to move the field forward.*

Commonweal/Institute for the Study of Health and Healing <i>In partial fulfillment of a \$110,000 pledge in support of the Institute for the Study of Health and Illness hiring of a full-time assistant for Dr. Remen in her work promoting “The Healer’s Art”.</i>	\$55,000
Global Medicine Education Foundation <i>In partial fulfillment of a \$20,000 pledge for general operating support for this elective course for medical students.</i>	\$10,000
The Institute for Healing in Society and Medicine <i>In support of the Society for Healing in Medicine and its commitment to the mentorship of physicians who are dedicated to healing in healthcare.</i>	\$5,000
North Hawaii Community Hospital <i>In honor of Earl Bakken’s 80th Birthday.</i>	\$1,000
The Bravewell Collaborative <i>In fulfillment of a \$1,100,000 leadership gift and a \$249,000 grant to support the PBS production “Good Medicine” that supports the advancement of integrative medicine.</i>	\$500,000
University of Arizona Foundation <i>In fulfillment of a \$50,000 pledge in support of the George Family Fellow in integrative medicine.</i>	\$25,000
<b><u>Total Integrative Medicine</u></b>	<b>\$884,300</b>

## YOUTH DEVELOPMENT

Minnesota Thunder P.L.U.S. <i>In fulfillment of a \$10,000 pledge in support of soccer and education programs that work with inner-city neighborhood youth centers.</i>	\$5,000
The Youth Foundation <i>In support of programs that provide resources and educational opportunities to the underserved youth of Edwards, Colorado.</i>	\$5,000
<b><u>Total Youth Development</u></b>	<b>\$10,000</b>

## OVERCOMING BARRIERS

Baby’s Space for Children’s Justice Project <i>In support of the establishment of a childcare center at the Whittier Neighborhood Early Learning Center.</i>	\$10,000
Planned Parenthood of Minnesota/South Dakota <i>In partial fulfillment of a \$15,000 pledge for general operating support.</i>	\$5,000
Tubman Family Alliance <i>In fulfillment of a \$20,000 pledge in support of the Alliance’s Spirituality, Health and Healing Initiative.</i>	\$10,000
Twin Cities RISE! <i>In partial fulfillment of a \$100,000 pledge in support of this skills training program for hard-to-employ adults.</i>	\$50,000
University of St. Thomas <i>In partial fulfillment of a \$100,000 pledge in support of the Interprofessional Center, providing counseling and legal services using the joint resources of UST schools of Law, Social Work and Professional Psychology.</i>	\$33,333