

Community Foundation Sonoma County Socially Responsible Investment Pool - Managers and Social Screens

The SRI Investment Pool is governed by the same [Investment Policy Statement](#) as the main long-term pool, with additional socially-responsible investment criteria.

Social screening typically involves excluding certain companies for products or practices that are considered negative.

A growing movement toward "positive screening" involves selecting companies based on their positive contributions to society or the environment.

Positive & Exclusionary Screens

P=Positive Screen R= Restricted (minimum criteria) X=Exclusionary Screen no=no screen

	Manager Name	% of Pool	Type	Style	Notes	Environ-ment	*Com-munity Investing	Share-holder Activism	Human Rights	Employ-ment	Services/products	Weap-ons	Animal Testing	Nuclear Power	Alcohol	Tobacco	Gam-bling
1	Calvert Social Bond Fund	28%	Bonds-Domestic	Interm. Term		P/X	P/X	yes	P/X	P/X	P/X	X	R	X	X	X	X
2	Neuberger Berman Socially Responsive Fund	18.75%	Equity-Domestic	Large Cap Value		P/X	n	yes	n	P/X	P/X	X	no	X	X	X	X
3	Dana Investment Advisers	18.75%	Equity-Domestic	Large Cap	individual account manager	P/X	n	n	P/X	P/X	P/X	X	no	X	X	X	X
4	Walden Asset Management	17.5%	Equity-Domestic	Small Cap	individual account manager	P/X	n	yes	P/X	P/X	P/X	X	X	X	X	X	X
5	Calvert World Values International	15%	Equity-Int'l	Large Cap Value		P/X	yes	yes	P/X	P/X	P/X	R	no	X	R	R	no
6	Cash Equivalents	2%	Money Market			SOURCE: SocialFunds.com , the website of SRI World Group, inc. All social screen information is from SocialFunds.com, except for Walden Asset Management and Dana Investment Advisers, which are individually managed accounts.											
	TOTAL	100%															

*Community Investing addresses the financial needs of low income and underserved communities. Community investments can be made through institutions such as community development banks, community development loan funds, and community development credit unions. These investments include products such as loans, checking, savings, CD's, and money market accounts.

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