

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	mutual fund	P/X	P/X	yes	P/X	P/X	P/X	X	R	X	X	X	X
2 CRA Qualified Investment Fund		Mortgage-backed Securities & Municipal Bonds	mutual fund	Targeted community investment in fixed income securities - manager has committed to finding investment opportunities in Sonoma County equal to our investment in the fund												
3 Neuberger Berman Socially Responsive Fund	18.75%	Equity-Domestic	Large Cap Value	mutual fund	P/X	no	yes	no	P/X	P/X	X	no	X	X	X	X
4 Dana Investment Advisers	18.75%	Equity-Domestic	Large Cap	individual account manager	P/X	no	no	P/X	P/X	P/X	X	no	X	X	X	X
5 Walden Asset Management	17.5%	Equity-Domestic	Small Cap	individual account manager	P/X	no	yes	P/X	P/X	P/X	X	X	X	X	X	X
6 Boston Common Asset Management, LLC	15%	Equity-Int'l	Large Cap Core	individual account manager	P/X	yes	yes	X	P/X	P/X	X	P/X	X	X	X	X
7 Cash Equivalents	2%	Money Market			SOURCE: SocialFunds.com , the website of SRI World Group, inc. All social screen information for mutual funds is from SocialFunds.com. Managers of individually managed accounts have provided social screen information.											
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. Revised 8-09