29 years of CREATIVE grantmaking

2019 Report

philanthropic ventures foundation
New Definition To Philanthropy

A new year and continuing our efforts to do creative philanthropy.

We have a three pronged approach to our work:

1. Critical intervention money - finding places where limited funds can have impact
2. Quick response giving - funding when there is need, no delays or extensive application process
3. Trust - funding outstanding people and giving them flexibility to serve their communities

We are well known for our nimbleness, and the speed with which we work. We evaluate our giving constantly in order to support new needs, such as early dental care for low-income children, an employment resource worker for an entire community affected by layoffs, or accessible funds for individuals combating homelessness.

The border crisis is a challenge we are continuing to address locally by supporting asylum seeker’s and their families to find housing, food, and health services within our community.

At the same time, we give out upwards of 4,000 grants a year to teachers, social workers, and juvenile court judges to support children in need. Over the years, this has amounted to over $12 million, all done through one-page applications, 48-hr turnarounds and considerable collective impact.

It will be a busy year ahead, and we are blessed to be able to do our work.

Bill Somerville, Founder

Small Stone. Big Ripple.

At PVF, we’ve long acted on the belief that the smallest stone can make a big ripple.

Bill mentions our work around the crisis on our border. It’s a great illustration of how seemingly small starts can grow into larger movements. The immigration crisis is overwhelming. What can any of us possibly do?

When PVF heard about a small group of women who wanted to go down to the border crossing in McAllen, TX to witness what is happening there and to be of service to the families and children seeking asylum, we didn’t hesitate to make a small grant in support. That trip documented the horrible conditions on the border for families and children that have endured such danger and hardship to reach the US.

That small trip gave birth to the Bay Area Border Relief initiative and brought more people and more dollars into the effort. The ripple grew outward to organizations like UCSF and SalesForce, who joined hands with their support. That trip documented the horrible conditions on the border for families and children that have endured such danger and hardship to reach the US.

So it ends up that there was a path for us to do something about this seemingly intractable national problem. It started small. It started local. But the small ripple turned into a big ripple. And it all came back full circle to our continuing work in the Bay Area.

This is why we will continue as we enter this new decade to embrace a bias for action, trusting in people, and believing in radical collaboration. Because we’ve seen with our own eyes that even the smallest start is worth a chance.

James Higa, Executive Director

A Year in Review

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James Higa, Executive Director
2019 Grants

1991-2019 Total Grants: $158,061,300

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>$9,923,834</td>
</tr>
<tr>
<td>2018</td>
<td>$9,682,479</td>
</tr>
<tr>
<td>2017</td>
<td>$9,542,360</td>
</tr>
<tr>
<td>2016</td>
<td>$9,728,767</td>
</tr>
<tr>
<td>2015</td>
<td>$12,930,666</td>
</tr>
<tr>
<td>2014</td>
<td>$8,101,645</td>
</tr>
<tr>
<td>2013</td>
<td>$11,074,198</td>
</tr>
<tr>
<td>2012</td>
<td>$10,790,794</td>
</tr>
<tr>
<td>2011</td>
<td>$8,153,167</td>
</tr>
<tr>
<td>2010</td>
<td>$5,631,548</td>
</tr>
<tr>
<td>2009</td>
<td>$4,351,187</td>
</tr>
<tr>
<td>2008</td>
<td>$4,339,116</td>
</tr>
<tr>
<td>2007</td>
<td>$4,537,652</td>
</tr>
<tr>
<td>2006</td>
<td>$5,073,979</td>
</tr>
<tr>
<td>2005</td>
<td>$4,609,819</td>
</tr>
<tr>
<td>2004</td>
<td>$5,219,721</td>
</tr>
<tr>
<td>2003</td>
<td>$5,267,973</td>
</tr>
<tr>
<td>2002</td>
<td>$4,047,374</td>
</tr>
<tr>
<td>2001</td>
<td>$3,798,773</td>
</tr>
<tr>
<td>2000</td>
<td>$4,562,190</td>
</tr>
<tr>
<td>1999</td>
<td>$2,470,228</td>
</tr>
<tr>
<td>1998</td>
<td>$2,665,877</td>
</tr>
<tr>
<td>1997</td>
<td>$1,862,006</td>
</tr>
<tr>
<td>1996</td>
<td>$1,081,189</td>
</tr>
<tr>
<td>1995</td>
<td>$1,775,415</td>
</tr>
<tr>
<td>1994</td>
<td>$3,832,494</td>
</tr>
<tr>
<td>1993</td>
<td>$2,116,342</td>
</tr>
<tr>
<td>1992</td>
<td>$666,113</td>
</tr>
<tr>
<td>1991</td>
<td>$224,394</td>
</tr>
</tbody>
</table>

1991-2019 Total Grants: $158,061,300

2019 Grants

Donor Advised Funds
$4,783,443 (48%)

Designated Funds
$3,351,988 (34%)

Program Funds
$1,330,408 (13%)

Safety Net Funds
$457,995 (5%)

TOTAL 2019 GRANTS
$9,923,834

“Funding people, rather than paper.”
-Bill Somerville, Founder, PVF
We aspire to transform philanthropy and make it more responsive and collaborative to meet the needs of our community. We identify needs that can be met with philanthropic support, and then we devise program ideas to help tackle the issues head on. From this drive to address unmet needs came the idea of immediate-response grants, in which we provide funds within a 48-hour turnaround. We have established a variety of immediate-response grant programs, benefiting teachers as well as social workers and juvenile court judges who work with youth in foster care.

Foundations, individual donors, and businesses partner with PVF to establish unique immediate-response grant programs because of our grassroots giving expertise. We have created and administered programs for the following donors:

- The Barkley Fund
- Brit + Co.
- The Frank H. & Eva B. Buck Foundation
- The California Endowment
- David L. Klein Jr. Foundation
- David & Lucile Packard Foundation
- Eucalyptus Foundation
- Facebook
- Flora Family Foundation
- GIRLBOSS Foundation
- Heising-Simons Foundation
- Hellman Foundation
- Herbst Foundation
- Hutto-Patterson Charitable Foundation
- Joseph & Vera Long Foundation
- Lampert Byrd Foundation
- Peery Foundation
- Robert Half International Inc.
- Sand Hill Foundation
- San Francisco Foundation
- Thomas J. Long Foundation
- United Way Bay Area
- van Loben Sels/RembeRock Foundation
- The Westly Foundation
- Y&H Soda Foundation

We are open to new ideas and are ready to tackle pressing issues.

Are you interested in setting up a customized giving program?

Please contact:
Dawn Hawk, Chief Operating Officer
dhawk@venturesfoundation.org
(510) 645-1890

“I thank the foundation for making the process easy and accessible to teachers. The short application form was great! The check came within a week. The people I spoke with at the foundation were also friendly and helpful. I had tried to apply for grants in the past and was turned off by the difficult process and contact people who seemed reluctant to help. PVF has the complete recipe for a teacher-friendly grant—an easy application form, prompt mailing of check to the applicant, and easy reporting process. It is a grant well worth writing.”

– Romelda Famorcan, Speech-Language Pathologist, Shannon Elementary School, Pinole, California
Program Grants

In 2019, we administered the following programs in partnership with our donors:

<table>
<thead>
<tr>
<th>Program</th>
<th>Location</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts Resource Grants</td>
<td>Santa Clara &amp; San Mateo Counties, CA</td>
<td>Grants for public school teachers to enhance K-8th grade art programs. Supported by the Westly Foundation.</td>
<td>$46,000</td>
</tr>
<tr>
<td>Environmental Science Resource Grants</td>
<td>Alameda County, CA</td>
<td>Grants for public school teachers to enhance TK-12th grade environmental science curriculum. Supported by the Lampert Byrd Foundation.</td>
<td>$50,000</td>
</tr>
<tr>
<td>Excursion Grants</td>
<td>Alameda &amp; San Mateo Counties, CA</td>
<td>Grants for public school teachers to take K-5th grade students on field trips. Supported by the Geballe Family.</td>
<td>$150,000</td>
</tr>
<tr>
<td>Facebook Local Community Fund</td>
<td>Belle Haven &amp; East Palo Alto, CA</td>
<td>Grants to support non-profit programs providing services to the local community. Supported by Facebook.</td>
<td>$100,000</td>
</tr>
<tr>
<td>Grace Scholarships</td>
<td>United States</td>
<td>Undergraduate scholarships to international students to attend American colleges.</td>
<td>$73,500</td>
</tr>
</tbody>
</table>

“There is no shortage of innovative ideas amongst young people today. With the support, guidance, and mentorship from donors we can develop more impactful community projects, and drive positive change for the people around us.”

- Dante Alvarado-Leon, 2015-2016 Bay Area Inspire Awardee
Program Grants

2019 program funds continued:

<table>
<thead>
<tr>
<th>Program</th>
<th>Location</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsive Fund for Grantee Communications</td>
<td>United States</td>
<td>Grants for Heising-Simons Foundation grantees to pilot new communications ideas or expand/enhance existing communications projects.</td>
<td>$285,000</td>
</tr>
<tr>
<td>Mathematics Grants</td>
<td>Santa Clara &amp; San Mateo Counties, CA</td>
<td>Grants for public school teachers to enhance their math lessons for TK-3rd grade students. Supported by the Heising-Simons Foundation.</td>
<td>$60,000</td>
</tr>
<tr>
<td>Multi-Donor Teacher Resource Grants</td>
<td>Bay Area, CA</td>
<td>Grants for public school teachers to enhance instruction.</td>
<td>$24,142</td>
</tr>
<tr>
<td>Sand Hill &amp; Tom Ford Fellowships</td>
<td>Stanford, CA</td>
<td>Fellowships for Stanford University students to intern at foundations. Supported by the Sand Hill Foundation.</td>
<td>$135,000</td>
</tr>
<tr>
<td>Science Resource Grants</td>
<td>Alameda, San Francisco, San Mateo, &amp; Santa Clara Counties, CA</td>
<td>Grants to K-12th grade public school teachers to enhance science instruction in the classroom.</td>
<td>$13,500</td>
</tr>
<tr>
<td>Social Worker/CASA Grants</td>
<td>Bay Area, CA</td>
<td>Grants to support the critical needs of foster youth as requested by social workers and Court Appointed Special Advocates.</td>
<td>$68,218</td>
</tr>
<tr>
<td>Special Education Grants</td>
<td>Alameda &amp; Contra Costa Counties, CA</td>
<td>Grants for public school teachers and therapists serving TK-12th grade students with moderate to severe disabilities. Supported by the Thomas J. Long Foundation.</td>
<td>$112,500</td>
</tr>
<tr>
<td>Visiting Artist in the Classroom Grants</td>
<td>Alameda &amp; San Mateo Counties, CA</td>
<td>Grants for public school teachers, grades 1-12, to have a visual or material artist visit their classrooms. Supported by the Geballe Family.</td>
<td>$30,000</td>
</tr>
<tr>
<td>Youth Opportunity Scholarships</td>
<td>Bay Area, CA</td>
<td>Grants for youth to participate in extracurricular activities. Supported by the Lampert Byrd Foundation.</td>
<td>$180,000</td>
</tr>
</tbody>
</table>

2019 Program Grants: $1,330,408

We are continually inspired by the dedication and generosity of donors like you who answer the call to give again and again. You have made a difference in the lives of the kids we serve.”

–Angie, Social Worker, San Francisco County
Donor Advised Funds

We think of our donors as investors, people who see philanthropy as investments in positive change.

When people want to do exciting giving, they turn to PVF. PVF offers a variety of services to individuals, families, businesses, and foundations through Donor Advised Funds. We make grants to charitable projects that donors recommend, consult and strategize with donors on their giving plan, and help them navigate through the world of nonprofit programs. Donors benefit from our philanthropic expertise, extensive knowledge of the nonprofit community, and experience in turning ideas into action.

In 2019, we administered the following donor advised funds:

- Anonymous I Fund
- Anonymous III Fund
- Anonymous IV Fund
- Anonymous V Fund
- Albert J. Horn Philanthropic Fund
- Bailard Foundation Fund
- Bergstrom Foundation Fund
- Peter & Jane Carpenter Fund
- Carver Family Fund
- Josh Childress Foundation
- Cohen Charitable Fund
- Doberstyn Fund
- Esperanza Fund
- Facebook Fund
- Farmhill Scholarship Fund
- Fleck Fund
- Gerber-Doyle Fund
- Barbara Jean & Allen L. Grimm Fund
- Hellman-Breslau Fund
- Horizons Unlimited Fund
- Joanna Katz Fund
- Katchadourian Family Fund
- Lockard-Marduel Fund
- Lurie Family Fund
- Maloney Family Fund
- Margaret Lamping Fund
- Medvin Fund
- Millar-Montrose Fund
- Monticello Venture Fund
- Orr Family Fund
- Pasturel Family Fund
- Peery Family Fund
- Jason & Lisa Peery Fund
- Petersmeyer Fund
- Relfe Fund
- Roxy Fund
- Mike Scott Fund
- Somerton Foundation Fund
- Spieker Fund
- Strock Family Fund
- Task Rabbit for Good
- Villagracia Fund
- Vision Advocate Fund
- Waverley Fund
- Whitehouse-Heffernan Family Fund
- Wienholz Fund
- Cole Wilbur Fund
- Xela Fund
- Yochum-Otani Fund
- YWCA of the Mid-Peninsula Fund

Are you interested in setting up a Donor Advised Fund?

Please contact:
Dawn Hawk, Chief Operating Officer
dhawk@venturesfoundation.org
(510) 645-1890

2019 Donor Advised Grants: $4,783,443

“As we write this we are in Tanzania visiting the site of a soon to be established model girls secondary school which may well change the way that young women in Africa are educated and prepared for leadership - and this project could not be happening without PVF being willing to support truly innovative ideas. PVF does with ease what others consider to be difficult.”

- Peter and Jane Carpenter, longtime PVF donors
PVF places high trust in outstanding individuals and programs, demonstrates flexibility and creativity in grant-making, and takes the initiative in providing funding when it is needed. These grants, made without applications and based on trust, are unique in the grantmaking sector.

Our ability to respond to community needs on a discretionary and immediate basis is made possible by bequests and gifts to PVF’s endowment and by undesignated gifts from donors. PVF is proud to have their confidence.

Would you like to learn how you can support PVF’s endowment?

Please contact:
James Higa, Executive Director
jhiga@venturesfoundation.org
(510) 645-1890

2019 Safety Net Grants: $457,995

“Often, our important professional and personal commitments override opportunities to hear about what is happening to help our communities. We get to community efforts “sometime” or plan for it in retirement. Bill Somerville’s and PVF’s encouragement to go to the places we want to support and get to know the people there was truly eye-opening in understanding an impactful way to participate now.” - Shilpa Andalkar, Wealth Manager at Ensemble Capital
Designated Funds

In the spirit of expanding philanthropy and promoting outstanding charitable work, PVF serves as the depository for projects that do not yet have their tax exempt status but do charitable work.

PVF’s Designated Funds allow multiple donors to receive a tax deduction for contributing to a charitable program. A Designated Fund provides donors with flexibility, enabling them to target support for innovative ideas. PVF manages the funds and prepares financial reports for the program leaders.

Are you interested in setting up a Designated Fund?

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<table>
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<tr>
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<th>Mission</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Aide Au Zanskar - USA</td>
<td>India</td>
<td>Project to support the development and functioning of the Lamdon Model High School in the Zanskar region of Kashmir, India.</td>
<td>$13,840</td>
</tr>
<tr>
<td>Agency by Design Oakland</td>
<td>Bay Area, CA</td>
<td>Aims to redefine what learning looks like in schools through maker-centered education.</td>
<td>$90,563</td>
</tr>
<tr>
<td>All in Alameda County</td>
<td>Alameda County, CA</td>
<td>Aims to reduce poverty and eliminate food insecurity in Alameda County.</td>
<td>$258,139</td>
</tr>
<tr>
<td>ALMA Philanthropy</td>
<td>United States</td>
<td>An online giving platform that empowers modern philanthropists to make an impact by making it easy to give to and connect with the causes and nonprofits they care about.</td>
<td>$69,202</td>
</tr>
<tr>
<td>Altruistic Action</td>
<td>International</td>
<td>Creates projects, media and community events with the intent to educate and empower people on climate change, equality and public health.</td>
<td>$5,482</td>
</tr>
<tr>
<td>Bay Area Border Relief, Estamos Contigo</td>
<td>Bay Area, CA &amp; McAllen, TX</td>
<td>Aims to assist immigrating families and the nonprofit agencies that support them with immediate urgent needs.</td>
<td>$89,180</td>
</tr>
</tbody>
</table>

“PVF has taken philanthropy from the traditional grantmaking paper shuffle, to the neighborhoods and classrooms. Bill Somerville’s creative and entrepreneurial spirit, coupled with his willingness to experiment and trust, has reinvigorated crucially important non-profit groups while helping to save lives on the edges of American society.”

– Jackie Speier, US Representative, 14th Congressional District of California
### Designated Fund Grants

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<table>
<thead>
<tr>
<th>Fund</th>
<th>Location</th>
<th>Mission</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catholic Worker Program</td>
<td>Redwood City, Half Moon Bay, &amp; San Bruno, CA</td>
<td>Assistance to the poor through housing, food, and education programs.</td>
<td>$100,100</td>
</tr>
<tr>
<td>Cocokind Impact Foundation</td>
<td>United States</td>
<td>Aims to provide financial grants to female entrepreneurs in health, wellness, and sustainability industries who are focused on creating social impact through business.</td>
<td>$58,300</td>
</tr>
<tr>
<td>Compassionate Chefs Cafe</td>
<td>San Francisco, CA &amp; New Delhi, India</td>
<td>Aims to uplift the lives of less fortunate children in the Tenderloin District of San Francisco and in New Delhi, India.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Conflict Transformation Fund</td>
<td>United States</td>
<td>Strengthens conflict literacy in progressive movement organizations through funding, research and organizing.</td>
<td>$192,162</td>
</tr>
<tr>
<td>Crystal City Pilgrimage Committee</td>
<td>Crystal City, TX</td>
<td>Seeks to promote dialogue, relationship building and education about the Crystal City Internment Concentration Camp.</td>
<td>$5,000</td>
</tr>
<tr>
<td>El Pueblo Unido</td>
<td>Puerto Rico</td>
<td>Aims to create sustainable, enriching exchange programs between public school students and educators on the mainland and in Puerto Rico.</td>
<td>$57,511</td>
</tr>
<tr>
<td>Frick Parent Engagement</td>
<td>Oakland, CA</td>
<td>Aims to build parent and caregiver engagement and participation at Frick Impact Academy.</td>
<td>$33,844</td>
</tr>
<tr>
<td>Generosity in Action</td>
<td>International</td>
<td>Supports educational and health projects in communities identified by travelers to developing countries.</td>
<td>$486,910</td>
</tr>
<tr>
<td>GIRLBOSS Foundation</td>
<td>United States</td>
<td>Aims to empower the next generation of female entrepreneurs within the creative community.</td>
<td>$30,000</td>
</tr>
<tr>
<td>Innovations in Mental Health</td>
<td>Alameda County, CA</td>
<td>Funds new ideas that improve the quality of life for those at risk of or living with serious mental illness, their support networks and families.</td>
<td>$205,232</td>
</tr>
<tr>
<td>Jorge Villarreal Fund</td>
<td>Latin America</td>
<td>Supports safe, high quality and low-cost services for sexual and reproductive healthcare.</td>
<td>$40,040</td>
</tr>
<tr>
<td>Juvenile Justice Literacy Fund</td>
<td>Alameda County, CA</td>
<td>Supports educational needs of youth at Oakland Unified School District libraries and the Alameda County Juvenile Justice Center.</td>
<td>$5,252</td>
</tr>
<tr>
<td>The Lapacho Fund</td>
<td>Paraguay</td>
<td>Supports Paraguayan NGO’s working in the fields of education, the arts, health, job creation and poverty alleviation.</td>
<td>$285,000</td>
</tr>
</tbody>
</table>

“The idea and need for Generosity in Action (GIA) – travelers helping in developing countries – came when I discovered that there was no easy way to accomplish the traveler’s wish to give back. I found that if a traveler’s donation could be tax deductible, the amount they would offer was far greater. Ambassador Bill Lane, former publisher of Sunset and friend from my many years in the travel industry, suggested that if anyone could accomplish my goal, Bill Somerville was the person. One phone call to Bill and I had the program under way.” – Duncan Beardsley, founder of Generosity in Action, a PVF designated fund
## Designated Fund Grants

### 2019 designated funds continued:

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<tr>
<th>Fund</th>
<th>Location</th>
<th>Mission</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Libraries Without Borders</td>
<td>International</td>
<td>Committed to expanding access to information for underserved communities and families.</td>
<td>$39,200</td>
</tr>
<tr>
<td>Modern Alliance</td>
<td>United States</td>
<td>Aims to educate and empower to eradicate harassment.</td>
<td>$83,149</td>
</tr>
<tr>
<td>SheEO</td>
<td>United States</td>
<td>Aims to democratize venture capital and create a new economic model of radically generous women creating change through local communities and impact through global scale.</td>
<td>$715,225</td>
</tr>
<tr>
<td>Silicon Valley Next</td>
<td>Bay Area, CA</td>
<td>Seeks to develop the next generation of nonprofit leadership in Silicon Valley through a “shared talent pool” model.</td>
<td>$15,000</td>
</tr>
<tr>
<td>Stone Soup PDX</td>
<td>Portland, OR</td>
<td>Seeks to train populations who are at risk of homelessness for jobs in the food service industry.</td>
<td>$84,574</td>
</tr>
<tr>
<td>Sustainable Future Outdoor Academy</td>
<td>Oakland, CA</td>
<td>Aims to teach young people how to lead sustainable lives and influence their families, schools and communities to do the same.</td>
<td>$169,290</td>
</tr>
<tr>
<td>TLC for Kids Sports</td>
<td>Bay Area, CA</td>
<td>Raises funds to renovate sports fields.</td>
<td>$17,275</td>
</tr>
<tr>
<td>Toledo Institute for Development and Environment</td>
<td>Belize</td>
<td>Engages stakeholders in the sustainable management of natural resources within the Maya Mountain Marine Corridor of southern Belize for the benefit of all.</td>
<td>$69,494</td>
</tr>
<tr>
<td>The Town Kitchen</td>
<td>Oakland, CA</td>
<td>Educates, employs and empowers young people in Oakland’s food scene.</td>
<td>$80,193</td>
</tr>
<tr>
<td>Wolfman New Life</td>
<td>Oakland, CA</td>
<td>Bookstore, small press, event space, and community arts hub with the mission of creating a sustainable home for the Bay Area’s vibrant underground culture.</td>
<td>$24,528</td>
</tr>
<tr>
<td>Various other designated funds with low activity</td>
<td>United States</td>
<td>----</td>
<td>$18,303</td>
</tr>
</tbody>
</table>

### 2019 Designated Fund Grants: $3,351,988

“PVF is efficient, it’s lean, and it’s the way philanthropy should be.”
– Dien Yuen, Managing Director at Kordant Philanthropy Advisors
Our Team

Foundation Staff

James Higa
Executive Director

Savannah Lira
Program Officer

Bill Somerville
Founder

Aly Quiroz-Perez
Program Associate

Dawn Hawk
Chief Operating Officer

Kari Jo Maracic
Bookkeeper

Sheryl Young
San Mateo County Program Director

Emily Gifford
Bookkeeping/Administrative Assistant

Board of Directors

Colburn S. Wilbur, Chair
Former President, The David and Lucile Packard Foundation

Bill Somerville, President
Founder, Philanthropic Ventures Foundation

Alicia Aguirre
Council Member, Redwood City; Professor, Cañada College

Jackie Speier
US Representative, 14th District of California

Duncan Beardsley
Director, Generosity in Action

Adrienne J. Tissier
Former Supervisor, San Mateo County Board of Supervisors

James R. Cody
Director of Estate & Gift Planning, Rosewood Family Advisors, LLP

Moira C. Walsh
Managing Attorney, Office of the San Francisco City Attorney

James Higa
Executive Director, Philanthropic Ventures Foundation