

# An Update on CCM’s Diversity, Equity, and Inclusion Efforts

CCM is committed to the principles of diversity, equity, and inclusion (DEI). We believe incorporating DEI policies and practices enhances results, and as such, we facilitate diversity in employee hiring, training, and promotion and also consider them in our investment processes. In 2020, CCM formalized these time-tested practices across the firm representing different backgrounds and created a new DEI committee shaped by our values and our work with team members across the firm and with different backgrounds and life experiences.

## CCM’s Strategic DEI Plan

In an effort to cultivate an inclusive work environment in which all employees are meaningfully engaged and can develop and succeed, CCM developed a DEI Strategic Plan for Fiscal Years 2021–2024 to provide a blueprint to build upon. This plan includes measurable actions that are designed to help fully integrate diversity, inclusion, and opportunity in the strategic decision making of the firm; enhance organizational effectiveness; and meet future challenges. Read more about CCM’s commitment to DEI in our August 2021 perspective, [Diversity, Equity, and Inclusion in the Workplace](#).

**What does Diversity and Inclusion mean to CCM?**  
Diversity is a collection of individual attributes that together help our team pursue the firm’s objectives effectively. Diversity is a relational concept that shows up in the composition of our team and is measured on a collective whole. Inclusion is about a sense of belonging experienced by all our team members. It is about a work environment that makes everyone, regardless of who they are or what they do for the business, feel equally involved in and supported in all areas of the workplace.

<p><b>GOAL 1</b> Build consensus around the mission and vision of the Strategic Plan for diversity and inclusion within the company</p>	<p>In the last year, CCM has facilitated presentations and discussions in recognition of Black History Month, Women’s History Month, Juneteenth, and National Hispanic Heritage Month. We have also discussed diversity and inclusion in the workplace, including efforts to bring more diversity to the team, ideas for diversity initiatives, and ways to strive for a multigenerational and gender-neutral workforce.</p>														
<p><b>GOAL 2</b> Maintain a gender-neutral workforce and work toward racial neutrality (30% racial minority)</p> <div style="text-align: center; margin-top: 20px;"> <p><b>Gender</b></p>  <table border="1" style="margin-left: auto; margin-right: auto;"> <tr><td>● Men</td><td>44%</td></tr> <tr><td>● Women</td><td>56%</td></tr> </table> </div>	● Men	44%	● Women	56%	<p>In the last year, we have hired three women and two men. Of the five new employees, 80% are racial minorities. Highlights of our gender and ethnicity diversity as of Juneteenth 2022:</p> <div style="text-align: center; margin-top: 20px;"> <p><b>Ethnicity</b></p>  <table border="1" style="margin-left: auto; margin-right: auto;"> <tr><td>● White</td><td>63%</td></tr> <tr><td>● Hispanic/Latino</td><td>9%</td></tr> <tr><td>● Black/African American</td><td>16%</td></tr> <tr><td>● Two or More Races</td><td>6%</td></tr> <tr><td>● Asian</td><td>6%</td></tr> </table> </div>	● White	63%	● Hispanic/Latino	9%	● Black/African American	16%	● Two or More Races	6%	● Asian	6%
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<p><b>GOAL 3</b> Engage with the broader community to promote equity, social justice, and inclusion (i.e., local community volunteer activities, corporate social responsibility initiatives)</p>	<p>In the last year, CCM partnered with the Urban League of Broward County to sponsor financial empowerment workshops. These workshops are designed to deliver the language of money and wealth in an effort to close financial education gaps and provide a pathway to financial dignity. CCM employees volunteered with HandsOn Broward to build kindness kits that were delivered to homeless shelters throughout our local community. The kits were distributed to families living in shelters and retired veterans living in transitional housing, moving from addiction to sobriety.</p>														
<p><b>GOAL 4</b> Enhance accountability, effectiveness, and collaboration through strategic use of DEI-related data in planning and assessment</p>	<p>We continue to engage and receive feedback from our team on our DEI efforts. We track diversity data for employees, management, ownership, volunteer participation, and community engagement. We are also working to track DEI data as it relates to our vendors.</p>														

## CCM's DEI Committee

CCM's DEI committee is a small group of employees who champion DEI in the workplace. The group is comprised of members across the organization who help establish a supportive and welcoming workplace environment in which employees of all backgrounds and demographic characteristics can work together.

### Members of CCM's DEI Committee



**James Malone,**  
Chief  
Financial  
& Diversity  
Officer



**Alyssa Greenspan,**  
President  
& COO



**Andy Kaufman,**  
Chief  
Investment  
Officer



**Priscilla Lozevski,**  
Head of  
Operations



**Danny Caballero,**  
Junior  
Portfolio  
Manager

## About CCM

Community Capital Management, LLC (CCM) is an investment adviser registered with the Securities and Exchange Commission. CCM was founded in 1998 and manages \$4 billion in assets. The firm believes a fully integrated portfolio — one that includes environmental, social, and governance (ESG) factors — seeks to deliver strong financial performance while simultaneously having positive long-term economic and sustainable outcomes. CCM's strategies utilize an innovative approach to fixed income and equity investing by combining the positive outcomes of impact and ESG investing with rigorous financial analysis, an inherent focus on risk management, and transparent research. For more information, please visit: [www.ccminvests.com](http://www.ccminvests.com).

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