

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. This perspective shares an update on the firm’s DEI efforts over the last year.

Strategic DEI Plan

To cultivate an inclusive work environment in which all employees meaningfully engage and can develop and succeed, CCM developed a DEI Strategic Plan for fiscal years 2021–2024. The 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.

Members of CCM's DEI Committee



James Malone,
Chief
Financial
& Diversity
Officer



Alyssa Greenspan,
Chief
Executive
Officer &
President



Andy Kaufman,
Chief
Investment
Officer



Shonali Pal,
Junior
Portfolio
Manager



Priscilla Lozevski,
Head of
Operations



Amina Rubin,
Impact
Research
Analyst

CCM's **DEI committee** is a small group of employees who champion DEI in the workplace. The group comprises 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.

<p>GOAL 1 Build consensus around the mission and vision of the Strategic Plan for diversity and inclusion within the company</p>	<p>CCM continues to find ways for diversity and inclusion in the workforce. In July 2022, CCM became a signatory to the CFA's DEI Code. CCM provides its employees with monthly diversity training videos with topics ranging from anti-racism to unconscious bias with the goal of cultivating a safer and more inviting work environment. As part of the firm’s annual employee on-site get together, activities promoted DEI to learn about employee’s backgrounds, origins, and cultures.</p>
<p>GOAL 2 Maintain a gender-neutral workforce and work toward racial neutrality (30% racial minority)</p>	<p>We are pleased to report that we continue to meet goal 2 with our gender and racial diversity as of Juneteenth 2023 as follows:</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>WOMEN 64%</p> </div> <div style="text-align: center;">  <p>PEOPLE OF COLOR 38%</p> </div> </div>
<p>GOAL 3 Engage with the broader community to promote equity, social justice, and inclusion (i.e., local community volunteer activities, corporate social responsibility initiatives)</p>	<p>CCM continues to support local community initiatives and volunteer activities and offers its employees paid volunteer days. Some of the organizations our employees volunteered at over the past year included HandsOn Broward, Urban League of Broward County, and the United Nations Foundations in addition to time with local youth sports leagues. In honor of Juneteenth 2023, employees will volunteer at Food For The Poor, an organization that helps families in need by providing food, housing, and emergency relief.</p>
<p>GOAL 4 Enhance accountability, effectiveness, and collaboration through strategic use of DEI-related data in planning and assessment</p>	<p>In early 2023, CCM conducted an employee survey to gather feedback on its DEI efforts and how it could enhance its efforts moving forward and to establish the firm’s next DEI plan for fiscal years 2025-2027. Many of the survey’s responses have or will be implemented.</p>

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