

Community Investment Process



This document outlines Surerus Murphy's process for local community giving where we align our investments with our business objectives and leverage our brand and reputation. This document does not apply to Indigenous investment as the business purpose for this investment activity is strategically different.

Purpose:

To identify investment opportunities that build resiliency in community citizenry with a focus on community building, youth support and sustainability and wellness initiatives. As a responsible construction organization that is leading the way within our industry toward supporting low-carbon development, we also support sustainable environmental initiatives that advocate for responsible stewardship of the land.

Objective:

To use community investment giving opportunities as a tool for building meaningful relationships with local communities. When done well, community investment banks goodwill equity to sustain an organization over time, useful if ever enduring a challenging relationship situation with a local community and promotes our brand in a way that differentiates the organization from peers and leaves a lasting positive impression. Through meaningful investment and partnerships, we can become the construction organization-of-choice for local communities.

Considerations:

- Consistency – giving within our parameters the same within all communities.
- Transparency – Being honest about funding decisions.
- Timely – Providing help when it is needed and ensuring funding decisions are made in a timely fashion.
- Beyond writing cheques, focus on building relationships.

Priorities:

Surerus Murphy is unable to support every opportunity that comes our way. Our community funding must align with our business priorities.

We **do** invest in:

- programs and initiatives that keep children safe and in school.
- programs and initiatives that build healthy and resilient community culture.
- programs and initiatives that promote mental health and overall wellbeing.
- programs and initiatives that work toward sustainability and teach responsible stewardship of the land.
- diversity, inclusion and all programs and initiatives that work toward an equitable citizenry.

We **do not** invest in, tolerate, or support anything to do with:

- racism, sexism, ageism, or culture-ism.
- and although individuals are welcome to support their own political/religious endeavors, as an organization we do not support religious/political requests. Organizationally, we are agnostic and unaffiliated.

Organizational Considerations:

Surerus Murphy's community engagement funding prioritizes funding of non-profit organizations or those that have registered charitable status. (Excluded from this statement is our Indigenous giving priorities.)

- A **charitable organization** (including foundations) must use their resource for activities that have a charitable purpose and fall into one of the following categories: relief of poverty, advancement of education, advancement of religion (which is outside of Surerus Murphy investment guidelines) and other purposes that benefit the community. Charitable organizations offer a tax receipt for donations.
- A **non-profit organization** provides products/services to improve or benefit a community and generate enough revenue to fund their objectives. Money made is not for personal gain of directors, staff or other members but goes back into the organization to further its aims and objectives. Non-profit organizations do not offer a tax receipt to donors.

(See: <https://www.canada.ca/en/revenue-agency/services/charities-giving/giving-charity-information-donors/about-registered-charities/what-difference-between-a-registered-charity-a-non-profit-organization.html> to understand the difference between non-profits and charities in Canada.)

Ranking:



Community:

1. Resilience – food security, wellness, elder support, etc.
2. Culture – gathering places, inclusiveness, togetherness, etc.
3. Training & Development – strong workforce
4. Business Development – economic vibrancy



Youth:

1. Safety & Security
2. Education & Healthy Youth Programming
3. Health & Wellness



Environment

1. Sustainability & stewardship initiatives

Capital

(Only funded through Surerus Murphy corporately; not through field-based giving.)

Needed community infrastructure:

- Naming rights
- Lasting sponsorship acknowledgement
- Aligns with branding, business objectives

Giving Pillars:

Health & Wellness	
Common Physical Health Issues	Cancer, Diabetes, Heart & Stroke, Access to care, etc.
Common Mental Health Issues	Suicide, Depression/Anxiety
Health Supports	Counselling services, wellness programs, Ronald MacDonald House, camps for sick youth, etc.

Education	
Youth	Programming
Adults	Programming
Diversity and Tolerance	PRIDE, social programming and initiatives

Sustainability	
Reduced footprint	Programming
Clean water	Programming
Wildlife and local wildlife at-risk	Programming

Community	
Safety	Programming
New Canadian	Programming
Business sustainability	Programming

Types of Giving:

- **Directed giving** – targeted giving to fewer but larger and lasting initiatives aligned to business objectives where we can form partnerships, get engaged through volunteer opportunities (should we wish), measure our impact, and have longer-term brand recognition for the giving opportunity.
- **Ad Hoc** – more frequent but smaller giving amounts to organizations with an immediate need. These giving opportunities are more of a cheque presentation and once the funds are handed over, there is no further expectation for Surerus Murphy or receiving organization to stay in touch.

There are also two types of investments: sponsorship versus donation. In communities where we have a longer-term relationship, donations provide more ability to influence a community's growth and sustainability and to build partnerships with key stakeholders. Sponsorships give time-limited, location-limited brand recognition.

- **Donations** – charitable giving that invests in an organization, program, or initiative to help it meet its goals. Donations benefit the organization.
- **Sponsorship** – is a marketing tool. It is receiving brand recognition at an event, or for investing in goods or services. An organization provides sponsorship funding for brand exposure, aligning the organization's name/brand with the opportunity.

Strategy:

Investment – whether via donation or sponsorship – should align with Surerus Murphy’s giving pillars and have been filtered through Surerus Murphy’s ranking system. Giving strategy differs based on priority or secondary community.

Priority community:

- Actively doing business for longer than one year
- Community where we have repeat or multiple projects in or in close proximity
- A community where we expect to have future important projects

Secondary community:

- Actively doing business for less than one year
- A community where we will be exiting within the next six months
- Not in immediate proximity to our area of work – peripheral

	Priority	Secondary
Type of Giving:	Directed, where possible.	Ad-Hoc only
Max Yearly Amount:	\$5,000	\$1,500
Strategy:	<p>Proactive: Identify community minded Surerus Murphy employee(s) who may have a sense of community issues so we can target our giving to where there is greatest need.</p> <p>Measurement: Work with organizations in which we are investing to ensure our donations are having an impact. Each organization will have its own form of KPIs and we’d like to know how our investment can move the dial.</p> <p>Leveraging: Use the investment as a way to tell an organizational story of being engaged in the community. Focus is on partnerships, engagement, impact.</p> <p>In many cases, the receiving organization will leverage our investment through testimonial.</p> <p>Volunteer Opportunities: Often, these deeper partnerships do offer staff team building or volunteer opportunities.</p> <p>Sponsorship: Sponsorship giving isn’t a focus but in certain cases it may make sense.</p>	<p>Reactive: Invest in opportunities that align with our objectives in which the organization wishing for funding reaches out with a request.</p> <p>Measurement: One-off measurements</p> <p>Leveraging: Mostly cheque-giving snapshots</p> <p>Volunteer Opportunities: Unlikely, but possible</p> <p>Sponsorship: A large focus of an ad-hoc investment strategy.</p>

Swag:

Surerus Murphy swag is sought-after by employees engaged in their private volunteer and fundraising initiatives. Swag is requested to support children, partners, and the employee themselves. When Surerus Murphy supports an employee with a swag request, it isn't for business benefit, it is purely to support our employees who are engaged in their communities. A consistent approach is required for equity amongst all Surerus Murphy members.

Although we'll make our best effort to have these swag items available, at any given time, the Marketing department may not have the swag items in stock and in these cases, items cannot be provided. Our primary use of swag is to support executive leadership and encourage engagement at trade shows and career fairs.

Recipient	Swag Item (examples)	Value	Frequency/ Max
Spouses event	NA	NA	NA
Children's school or sporting event	Solar batteries Blue tooth speakers	\$100	A max of one item per year
Employee's event	Cooler	\$200	A max of one cooler per year
Employee Max	Employees can receive a max of \$300 in personal swag/year – one item for a child and one item for self, as opposed to three swag items for a child's event		



Surerus Murphy Cares Community Investment Logo:

This logo is available for third parties to use and recognize Surerus Murphy for our donation. Unlike our yellow/green track logo in which we tightly guard, this logo is not as tightly managed, and we do not need to approve its use. It will be provided to receiving organizations as a jpeg that they can post on their social channels to announce our donation.