

THE
SWINERTON
FOUNDATION

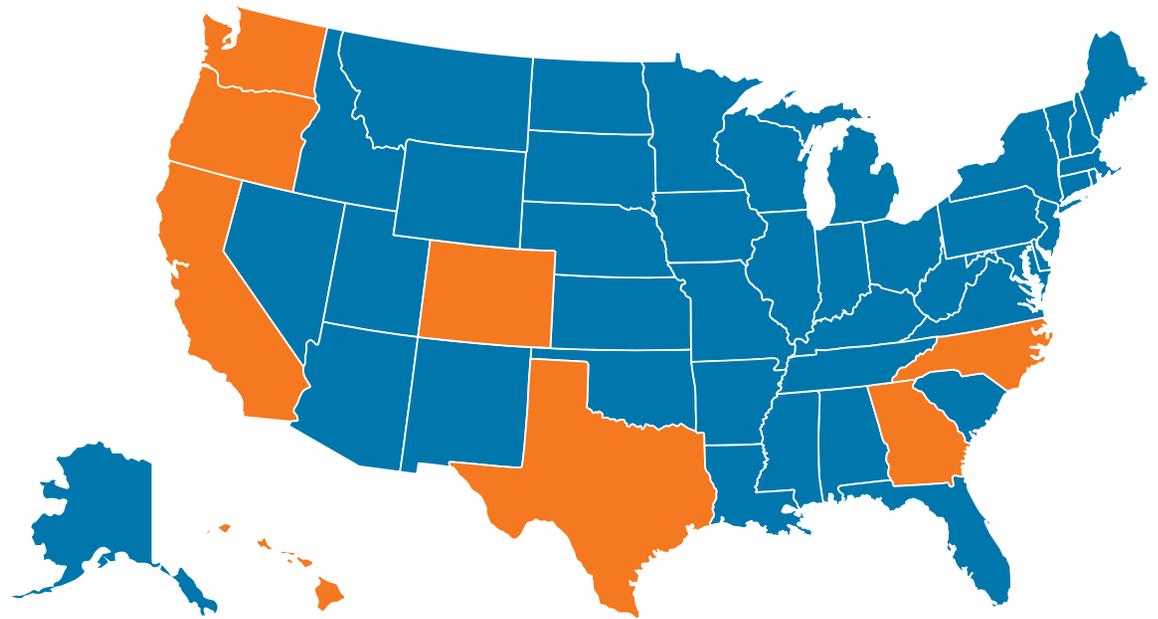


2017

ANNUAL REPORT

BUILDING BETTER COMMUNITIES

COMMUNITIES SUPPORTED



The Swinerton Foundation utilizes the skills of hundreds of volunteers in more than 40 communities across the United States to help build sustainable cities and neighborhoods by supporting education and development activities, workforce development programs, and community-focused non-profits that help cities thrive. The Swinerton Foundation also serves as a catalyst to encourage and expand the philanthropic endeavors of Swinerton Incorporated and its affiliates' employees.

OUR FOCUS AREAS



EQUITABLE EDUCATION

We support education and development activities that give individuals a greater opportunity to thrive.



RESILIENT COMMUNITIES

We believe in supporting community-focused non-profits that help cities thrive—by making them inclusive, safe, healthy, resilient, and sustainable.



SUSTAINABLE WORKFORCE

We support workforce development programs that provide access to and assist individuals in obtaining living-wage jobs.

TABLE OF CONTENTS

Letter From The President	01
Community Building Program	03
Adopt-a-School Program	05
Fall Giving Challenge	07
Swinerton Cares	11
Financials	17
Builders Club	19
Board of Directors	20

01

LETTER FROM THE PRESIDENT

“2017 was a record-breaking year. With the help of generous donors and incredible volunteers, we were able to distribute over \$970,000 and donate over 10,000 hours of our time to non-profits in communities across the country.”



At the core of our organization is a deep commitment to give back by focusing on equitable education, resilient communities, and sustainable workforces. Established in 2002, we have been able to contribute over \$5.7 million to hundreds of non-profit organizations. This year alone, we gave over \$970,000 to charitable organizations.

2017 was an exciting year for us. In January, we launched the Swinerton Cares program, which allows the Foundation to match gifts and provide Dollars for Doers, as volunteers give of their time to qualified non-profit charities. Following a Board of Directors' decision to broaden our charitable impact, we received reclassification as a public charity, which will allow us to expand and increase the number of charities we support and provide more flexibility in our grant-making.

Thank you all for your support of the Foundation and our activities so we may continue to be responsible corporate citizens and contributors to our communities.

Best,



Lori Dunn

03

COMMUNITY BUILDING PROGRAM

Giving opportunities to community members to access homeownership and preventing displacement for those who cannot afford home repairs.



Through our Community Building Program, we were able to donate \$77,500 to Rebuilding Together and Habitat for Humanity affiliates nation-wide. Volunteers donated over 1,000 hours to help community members and non-profits in need of desperate home repairs and housing.

PROGRAM SPOTLIGHT!

Mizti is a 52-year-old single mom and disabled veteran. She is a caregiver to her 77-year-old mother (a cancer survivor) and her 24-year-old daughter who suffers with multiple sclerosis.

Partnering with Rebuilding Together Austin, Meals on Wheels, and Easter Seals on the project, volunteers got to work installing a new storm door at the front entry; replacing siding on the home; installing a new garage door; painting the exterior; building a new pantry for the kitchen; installing new support beams in the laundry room; and repairing the back patio porch. By the end of the day, the team's hearts were full of pride for a job well done!



DID YOU KNOW?

- The U.S. has a shortage of 7.4 million affordable and available rental homes for extremely low-income households*
- More than half of the U.S. population lives in an urban area
- Housing instability creates stress and depression

*Source: *The Gap: A Shortage of Affordable Homes*, National Low Income Housing Coalition, 2017

05

ADOPT- A-SCHOOL PROGRAM

Improving vocational education in underserved schools by providing hands-on learning experiences.



Working alongside educators and school officials, we partnered with Fremont High School in Oakland, California in the fall to teach students about the many facets of the construction industry, including safety, design, estimating, scheduling, and project management.

Supplemental to the Architecture Academy's Senior Capstone class, volunteers donated their time to help students design and "bid" on a project to enclose an existing deck at the high school and convert it into a multi-use outdoor classroom.

Teams presented proposals to industry experts, who "awarded" the project to the team with the most innovative and cost-effective design that met all safety standards. In the spring, volunteers returned to the campus to finalize the design and begin construction.

Volunteers continue to prepare for construction of a 40-foot climbing tower at La Center High School in Washington. A partnership that began in fall 2016, instructors and students spent the first half of the year tirelessly designing and securing financing of the project, which will be added to the school's existing outdoor challenge course.



OUR IMPACT

- 20 students enrolled in the program
- 110 hours of hands-on learning instruction provided by volunteers
- More than \$40,000 raised for the climbing tower project

07

FALL GIVING CHALLENGE

Offering assistance to vulnerable community members by donating meals, essential items, time, and funds.



Our Fall Giving Challenge is an annual competition that encourages individuals to give back to their local communities by collecting monetary donations, volunteering their time, and providing essential items to those in need. In 2017, we asked participants to meet specific goals to address the most pressing issues our communities face.



OUR IMPACT

- Over 32,451 pounds of food collected, providing over 27,000 meals to those in need
- 5,798 toiletries, socks, and toys provided to homeless and disadvantaged individuals
- 1,366 hours donated to non-profits which provide food, essential items, and gifts to those in need
- \$139,631 given to non-profits that support programs which address food scarcity, homelessness, and provide assistance to children, seniors, and adults with disabilities

FALL GIVING CHALLENGE WINNERS

PORTLAND

To kick off the Challenge, Swinerton employees in Portland held their 2nd Annual Chili Cook-Off, where they were able to raise 61.75 pounds of food and \$150 between subcontractors and employees that attended. The funds were then used to purchase more items from Oregon Food Bank's "most wanted" list. By the end of the Challenge, the group collected a total of 837.5 pounds of food for the Food Bank, as well as toys for Albertina Kerr. In addition to donating goods, Swinerton employees donated 45 hours and \$4,800 to Kinship House, March of Dimes, New Avenues for Youth, Special Olympics, and Volunteers of America Oregon.



SAN FRANCISCO

The San Francisco group was amped up to maintain their title as champion. Donating 11,875 pounds of food for Alameda Food Bank and 1,364.71 pounds of food and 363 items for St. Anthony Foundation, the group collected the most goods of any other office. Employees also volunteered 195 hours and donated \$7,205 to Meals on Wheels San Francisco, Food Runners, San Francisco SPCA, St. Anthony Foundation, and SF-Marin Food Bank.



CONCORD

In Concord, employees had a great time building a playhouse for Habitat for Humanity East Bay/Silicon Valley, which was donated to a local family. The group also collected over 150 toys for Bay Area Crisis Nursery, collected 759.5 pounds of food for Food Bank of Contra Costa & Solano, donated \$2,875, and volunteered 93 hours for their selected charities.



SEATTLE

It was clear that the Northwest region was ready to compete when the final numbers from the Seattle group were published. The group, who chose local organizations FareStart, Northwest Center, Renewal Food Bank, Save the Children, and YouthCare YouthBuild, donated the most money of any group—an incredible \$16,983! What's more, employees donated over 200 hours of their time and collected 1,841 items for Northwest Center and 534 pounds of food for Renewal Food Bank.

AUSTIN & SILICON VALLEY

Swinerton employees in Santa Clara showed up in full force again this year, volunteering 155 hours to Fisher House, Martha's Kitchen, and Second Harvest Food Bank Santa Clara County, accomplishing 100% employee volunteer participation for the second consecutive year!

Employees in Austin created a "Voluntember" campaign for the month of November, focusing their efforts on volunteering each week for the entire month. Every employee participated in the campaign, resulting in 125 hours donated to Central Texas Food Bank, ARCH Homeless Shelter/Front Steps, Meals on Wheels Central Texas, and North Texas Food Bank. Additionally, the group donated items to Big Brothers Big Sisters Austin and Helping Hand Home, and provided \$2,700 to Austin Pets Alive, Big Brothers Big Sisters Austin, Helping Hand Home, Rebuilding Together Austin, SAFE (Stop Abuse for Everyone), and Vincare Services of Austin.



11

SWINERTON CARES

Increasing the charitable impact
of volunteerism and doubling
donations to charities.



Swinerton Cares is a workplace giving and employee engagement program that is offered to Swinerton Incorporated and its affiliates' employees. Through Swinerton Cares, employees can take advantage of gift-matching and Dollars for Doers.

Employee gift matching is a program where the Foundation makes a donation to match, dollar for dollar, an eligible employee's charitable contribution to an eligible charity of an employee's choice. Dollars for Doers is a program which promotes eligible employees' volunteer services.

For every volunteer hour an eligible employee donates to an eligible charity, the Foundation will donate \$25 to the employee's eligible charity of choice.



2017 HIGHLIGHTS

- Swinerton employees donated \$268,740 to charities across the nation
- Of this amount, \$128,050 was through the Dollars for Doers program as employees logged 10,443 volunteer hours
- With a match from The Swinerton Foundation, total giving exceeded \$412,000.

SWINERTON CARES IN ACTION

AMERICAN HEART ASSOCIATION (AHA)
SAN DIEGO, CA



“It was so incredible to see each of Swinerton’s amazing walkers on Saturday and to see so many people sharing their why on the Swinerton Tribute Wall!”

–Jennie Brane, AHA

**ANGELMAN SYNDROME FOUNDATION
SACRAMENTO, CA**



**“I have been truly blown away by the generosity shown by Swinerton, its great leaders, and employees.”
-Jason Miller, Swinerton Employee**

**CYPRESS MANDELA TRAINING CENTER & OAKLAND UNIFIED SCHOOL DISTRICT
OAKLAND, CA**



**“Your support demonstrates your ongoing dedication to our youth and genuine desire to introduce students to the lucrative careers in construction.”
-Emiliano Sanchez, OUSD**

SWINERTON CARES IN ACTION

SUNSHINE ON A RANNEY DAY ALPHARETTA, GA



“We don’t have to lift him anymore!”
-Eli’s mom, Beneficiaries of a New Bathroom & Bedroom



HABITAT FOR HUMANITY LEeward OAHU
KAPOLEI, HI



“What better way to give back to the community than to give a family a nice home to live in.”
-Jennifer Creedon, Swinerton Employee



COLORADO STATE UNIVERSITY CM CARES
FORT COLLINS, CO



“Before you came...we had a backyard deck that was too small and too unsafe to even allow our pets on it. Now, we feel like celebrities, and we can all get the much-needed vitamin D while sitting out together.”

-The Salem Family

17

FINANCIALS

Summary of The Swinerton Foundation's 2017 Consolidated Financial Statements for the year ending December 31, 2017.



OPERATING REVENUE

Consolidated operating revenues grew by 27%, increasing to \$1.49 million in 2017.

Of this revenue, \$475,990 came from various fundraising activities, including \$15,375 for our newly established Tony Williamson Building Better Futures Scholarship.

EXPENSES

Consolidated operating expenses in 2017 were \$992,724.

Because all of the administrator positions for the Foundation are voluntary and our leased space is donated, we are able to keep our operating costs low, allowing us to distribute \$977,091 of our expenses in the form of contributions and grants.

At year's end, our balance sheet reflected total assets of more than \$3 million, including \$2.1 million in investments, ensuring we are able to support our initiatives even in lean times.

19

BUILDERS CLUB

2017 donors who contributed
\$5,000 or more.

Array Technologies
Arthur J. Gallagher
Blymer Engineers
Brady SoCal
Brian Cox Mechanical Inc.
Building Material Corporation
Burner Sheet Metal
Construction Innovations
Countywide Mechanical
Systems, Inc.
CSI Electrical Contractors, Inc.
Cupertino Electric, Inc.
Delawie Dynaelectric
Elizabeth Williamson
Environmental Construction
Group, Inc.
GES Sheet Metal Inc.
Helix Electric, Inc.
Horizon Painting Co., Inc.
JinkoSolar Inc.
Johnson, Finch, & McClure
Construction, Inc.

JRG Services
KHS&S Contractors
La Mesa Glass Incorporated
Limbach Company LP
Linda Schowalter
Martin Bros.
Morrow-Meadows Corporation
NexTracker
Pacific Steel Group
Pacific Wall Systems
Safway
SASCO
Schetter Electric 4000
Shugar Magic Foundation
Stockbridge
Sunlink
Sunset Glazing
Swinerton
Tangram Flooring
The Conco Companies
Twining Inc.
Unitis

20

BOARD OF DIRECTORS



Lori Dunn
President



Rachael Guerrero
Secretary



Brad Peterson
Treasurer



George
Ehara



Frank
Foellmer



Eric
Foster



Meggie
Hollywood



Charles "Rick"
Moore



Sheri Ann
Murphy



Mark
Payne



Lia
Tatevosian



Myrna
Wagner



David
White



David
Worley



260 Townsend Street, Floor 5 | San Francisco, CA 94107
theswinertonfoundation.org

