



CORPORATE SOCIAL RESPONSIBILITY REPORT

2024



30
YEARS
SINCE 1944

OUR VISION

To be the professional provider of comprehensive solutions and services for facilities and homes.

OUR MISSION

To create a workplace where our employees can thrive. To be committed to finding innovative and original solutions thoughtfully and reliably – to meet the specific needs of every customer.

OUR VALUES

To honor God by serving people with respect, integrity, and compassion.



COMPANY OVERVIEW

For 80+ years, we have been helping families, facilities, and friends throughout the communities we serve. We lead the industry with innovative Home Services, Facilities Solutions, and cutting-edge Mechanical Construction capabilities. Our team of caring professionals provides services in everything from HVAC, plumbing, electrical, and appliance repair, to huge construction projects. We work with homeowners throughout the region, and with clients in government, institutional, commercial, healthcare, and industrial organizations. Our support of non-profit organizations – such as the American Heart Association and Second Harvest Food Bank – is at the very heart of who we are, and why we’re here. Our mission – and our expertise – is helping you.

OUR MISSION, OUR INTENT, OUR “WHY”

A Note from
Richard C. Perko



WE STAND ON THE SHOULDERS OF GIANTS ...

And that has never been more evident than in reflecting on our rich 80+ year legacy. As I consider how we got here, to this milestone moment in history, I’m reminded of all the people, then and now, who have made this legacy possible.

I’m also reminded of the thousands of customers, some who have long passed, some who are still loyal customers today. I’m reminded of the many suppliers we rely on to deliver time and time again.

Today, while we are very different than we were in 1944, so much remains the same. The culture, the commitment to quality work, the commitment to innovation, the commitment to an outstanding customer experience, and the commitment to our employees to create a place where they can thrive.

Above all, this is our commitment to Honor God through our work.

As we continue looking to the future, I have never been more excited about what’s ahead. We are strong, culturally, financially, and organizationally. We have the best people in the industry, and they continue to produce the best outcomes for our customers, our company, and each other. Indeed, the future is bright!

As our journey draws us forward, it is important that we remain committed to what got us here. It’s to that end our current theme is, “The LeeWay.” This term was coined many years ago, by leaders before me to establish one statement that embodies everything that lies within our culture.


“The LeeWay” is a call to be ethical, to always do the right thing, to serve each other with respect, integrity, and compassion. It’s a call to be our best every day, and to never take our customers for granted. And “The LeeWay” is much more. It’s a reminder for each of us to strive to attain a level of excellence unseen in our industry. I’m excited to bring back this mantra honoring our past and resetting the mark for how we will conduct our business in the future.

To our customers, thank you for your continued trust in us; we never take it for granted. We commit to you that we will always approach your concerns as if they were our own. And we will always be committed to “The LeeWay” of bringing forth and implementing the best solutions possible to meet your needs.

To our employees, you continue to amaze me with your skill, persistence, and work ethic in meeting the demands of our clients. I love you and I’m proud of your many accomplishments. Thank you for choosing to be part of Lee Company.

To our leaders, I remind you that everything rises or falls on leadership. Thank you for leading us forward and up. You have much responsibility, it’s no easy task, and I am grateful for your commitment to our mission, vision, and values ... the formula for our success.

Here’s to another 80 years! We remain committed to being the best company we can be for our customers, to creating a place where our employees can thrive, and to honoring God through our work.

Sincerely,

Richard C. Perko
President & CEO

SAFETY IS A CORE VALUE EMBRACED BY OUR LEADERSHIP AND TEAM MEMBERS. OUR GOAL IS FOR OUR EMPLOYEES TO GO HOME SAFELY EACH DAY.

“Health and safety are core values at the heart of everything we do. Being good stewards and business partners means doing all we can to ensure our people have the tools and support they need to stay safe, no matter the challenge.



24+ Hours of Safety Training Annually

We don’t just talk the talk. We walk the walk. We provide 24+ hours of safety training per employee, per year.

12 CPR Classes Annually

We offer monthly CPR classes to all employees, ensuring our people are prepared to act in an emergency.

“When employees feel safe, trust their leadership, and know their wellbeing comes first, they’re not just the backbone of our company - they’re the heartbeat of a strong, proactive safety culture.”



73 Toolbox Topics Per Year

Weekly jobsite meetings are held to ensure our team members are observing updated safety practices and to gather timely feedback.

260 Safety Start Huddles

Daily leadership-led meetings are held so each team member has knowledge of tasks, awareness of hazards, and starts the day right.

Scott Gage
Director of Safety

	2023 LEE COMPANY AVERAGE	2024 LEE COMPANY AVERAGE	INDUSTRY AVERAGE
TRIR	1.83	1.59	3.1
DART	0.90	1.08	1.3
LWC	0.40	0.68	1.4

All data is measured in increments of 100 employees.

TRIR: Total Recordable Injury Rate*
DART: Days Away and Restricted Time Rate**
LWC: Lost Work Case Rate***

*The TRIR is a measure of injuries that were serious enough to require treatment by a medical professional.
**DART measures injuries that were serious enough to require time away from work or injuries where the employees’ activities are restricted to less than their routine job scope.
***LWC is a measure of injuries that are serious enough to require time away from work.

With our virtual construction team, we’re also using innovation to attract a new generation of construction professionals. Our team is comprised of women and men ranging from 20 to 60 years of age. Their education and career backgrounds are equally diverse; we have team members who have transitioned from our manufacturing facility to virtual construction, others with high school drafting class experience, all the way to degrees in computer drafting and mechanical engineering.



1.7+ MILLION POUNDS
of sheet metal are produced per year in our manufacturing facility.

PURCHASE OF AN HGG PIPE PROFILER
Our HGG Pipe Profiler will allow us to cut and prep steel pipe 30% faster than before.

DESIGNING:
Virtual Construction and Design

Our Virtual Construction Group works with architects, engineers, and designers, along with members of our sales and finance team, to understand each project’s construction goals, plans, and budgets. Because of pre-planning and preparation, we save time and resources as we effectively build a city.

BUILDING:
We Shape Skylines

We build the mechanical systems in pieces, put them on a cart, and deliver them to the jobsite at the appropriate time. Our logistics crew transfers them to the next area, so the craftsmen have them readily available. By optimizing the delivery of materials to the jobsite, our quality and productivity improve.

- In addition to saving time, we put fewer vehicles on the road, creating less impact on the environment.

FABRICATING:
It Happens in the Manufacturing Facility

Using Building Information Modeling (BIM) and other technology, our experienced team takes the designer’s intent and makes it “fabricable.” Coupling the data and incorporating safety techniques, we can effectively fabricate and deliver pre-built products to multiple jobsites.

- Our Vicon coil line allows us to produce ductwork 5x faster than in previous years.



EXPERTISE MEETS

TECHNOLOGY



LEESTAT –
Not on site? We can be!
494 LEESTAT CASES

Our LeeStat technology is a smart thermostat system which provides round-the-clock remote monitoring, under the watchful eye of our experienced professionals.

OUR TEAM IS VIRTUALLY THERE –

On demand experience

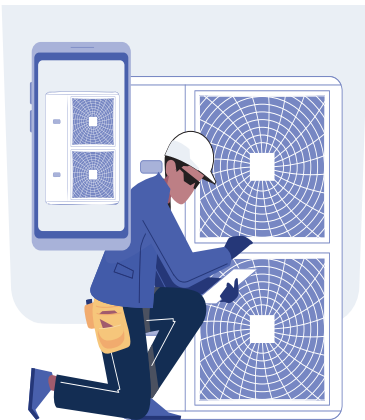
Our virtual support team focuses on what matters to our customers by combining years of experience with leading technology. Utilizing telepresence, remote monitoring, vibration analysis, and data collection, our team delivers solutions in real time to reduce downtime for our customers.

Our predictive analytics software analyzes data gathered from a Building Automation System. We review it and inform our customers about issues while providing solutions. Whether buildings are fully active, undergoing routine maintenance, or operating with limited occupancy, our customers have peace of mind knowing their HVAC equipment is running efficiently and reliably.

51,681 ALERTS RECEIVED



1,955 TECHNICAL SUPPORT CASES



INSIGHT –
You see what we see
1,674,801 PHOTOS
203,995 VIDEOS

Through our visual findings platform we take a homeowner or facility customer along. We believe that transparency builds trust, so we deliver it with every service call.

CREATING A PLACE WHERE OUR EMPLOYEES CAN THRIVE



Each employee, each career here, represents a unique opportunity for growth, success, and happiness. The list of possibilities goes on and on: from training, to volunteering, to mentoring, and beyond. We stand by our commitment to support employees on their personal and professional journeys. Through the years, we've seen that employees not only thrive when they find work/life balance and job fulfillment, they also gain more capacity to give back to their communities.

Our goal is for our people to retire with confidence from a job they truly enjoyed, a job that made a difference for their family and friends, along with their company, colleagues, customers, and community.

WE INVEST IN EACH OTHER

As a member of the Lee Company family, every employee is encouraged to learn, grow, and thrive. Every group and specialty area of our company offers opportunities for growth and education.

We value the art of mentorship and encourage employees to find subject matter experts to learn from. We also encourage our experienced experts to share their information and knowledge with newer employees. The lessons and skills people learn here set them up for lifelong success.

Trade-Specific Learning Opportunities

Lee Company University is a unique job benefit and tremendous opportunity. All employees have access to free technical training while building toward a journeyman's license in their preferred trade. Each

graduate receives a National Center for Construction Education and Research (NCCER) certification.

**85 Lee Company University Graduates
Completing 97 Classes**

20 expert instructors

15 different classes with 4 trades:
Electrical, HVAC, Plumbing, Welding, plus Project Management

Non-Trade Specific Learning Opportunities
Leadership 1.0 and S.T.E.P.
(Success Through Exploring Possibilities)

These programs help employees advance and develop their careers by exploring the opportunities and responsibilities of various supervisor and managerial roles.

2024 Graduates:
12 Leadership Academy
34 S.T.E.P.

WORKDAY Learning

Five years ago, we launched a multi-tiered learning system for our people. This included on-demand, selfpaced, and virtual training videos to foster professional growth. We also enabled our teams to upload their own training videos, allowing trainees to become trainers.

CREATING A PLACE WHERE OUR EMPLOYEES CAN THRIVE

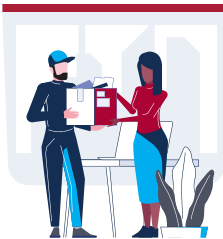
SkillBridge Program

We partnered with the Department of Defense to create development opportunities for veterans during their final six months of service.

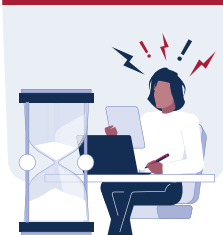


The Lee Emergency Assistance Fund (LEAF)

This fund provides financial help to our employees who experience a personal or family tragedy. Each employee can contribute to the program and our company matches employee contributions.



**\$148K+ GIVEN TO
LEE COMPANY FAMILIES**



**10 SKILLBRIDGE
PARTICIPANTS WORKED
WITH US IN 2024 AND
6 WERE HIRED AS FULL
TIME EMPLOYEES**



**\$185K+ WELLNESS
REWARDS PAID**

750 employees signed up to receive Archer Health Biometric Screenings and 500 employees watched more than 1,800 Learn & Earn Benefit Videos!



GIVING BACK TO THE COMMUNITIES AND WORLD THAT GIVE US SO MUCH

Giving back to the community is part of our heritage and our heart. We don't talk much about it, because we're not donating time, money, or expertise to garner praise: We give back because it's the right thing to do. Of course, if telling the story of our philanthropy spurs others to give back, or sparks an idea on how to move forward, we're delighted to share.

One way we've invested in change is through vocational training and by supporting programs that help people re-enter the workforce. We've seen firsthand how investing in these causes impacts lives.

For example, we've partnered with ShowerUp, an organization serving the homeless population, to provide shower services and personal care. We're honored to help people who are experiencing tremendous difficulties feel better and gain confidence. We've seen the difference a shower and haircut make, as those who've been homeless gain the courage needed to take their next step. We also work alongside the Nashville Rescue Mission on programs that offer dignity and restored hope for the local homeless community.

WHY DO WE DO IT?

Our mission is to create a place where our employees can thrive, and we believe that the importance of thriving does not stop at our doors; it extends into our community.

PHILANTHROPY: FOOD, JOBS, AND SECOND CHANCES

26 years of partnership with Men of Valor. Their mission is aligned with ours: We both believe in second chances.

25 years of supporting Second Harvest Food Bank. Employee-led Vans4Cans food drive contributions since 2010: **452,646 pounds**

4 construction and fabrication employment opportunities resulting from our partnership with Hope Center Ministries.

COMMUNITY SUPPORT: SPORTS AND MORE

One way we give back is by contributing to local schools. We appreciate the value in education and the various programs that help our youth. It's good for kids to feel they are part of something, and we're glad to serve as a sponsor and supporter.

Sponsored 50 schools in multiple regions.

Participated in 70 school career events.

Hosted job shadowing for 22 students.

IMPACTING OUR COMMUNITY

As we continue to grow, so does our impact. We're honored to support organizations like Second Harvest Food Bank, One Generation Away, Men of Valor, Place of Hope, the American Heart Association, and Special Olympics, because when our communities thrive, we all grow together.

LEE COMPANY CARES

Giving back is at the heart of everything we do. For 80+ years, we've been serving customers with care and expertise. Our mission of creating a place where our employees can thrive, along with our values of respect, integrity, and compassion, reflects the principles that have guided us from the very beginning.

But it's not just what we do; it's who we are, and one of the ways we honor God. Giving is an essential ingredient of faith, and it doesn't stop at the homes we service, the facilities we maintain, or the projects we build. It extends into the communities where we live and work.

That's why we created Lee Company Cares, an initiative focused on addressing critical needs facing our neighbors. Through strong partnerships with nonprofit organizations, we've connected to causes that focus on three areas of great need:

FOOD INSECURITY

We provide food for our neighbors, so they don't go to bed hungry.

SECOND CHANCES

We believe in second chances by providing opportunities for a fresh start in life.

HEALTH AND WELLBEING

We support wellness organizations who focus on providing good health education to the world.

WANT TO LEARN MORE
ABOUT HOW YOU CAN
GET INVOLVED?
Visit leecompany.com/cares.



CORPORATE SOCIAL RESPONSIBILITY REPORT 2024