

COMMUNITY & SOCIAL RESPONSIBILITY

Corporate & Social Responsibility, the Community and the Environment

- (a) As business advisers, we are interested in fairness. We believe we owe our wider responsibilities to our people, environment, marketplace, and the community around us.
- (b) Our approach to Corporate & Social Responsibility (CSR) balances the type of business we operate and the people who work with us, with the needs of our local and wider communities.
- (c) By aligning those two elements, we have devised a CSR strategy with two principal aims:
 - to encourage a culture of Community involvement and engagement; and
 - to minimise our Environmental impact
- (d) These aims are underpinned by our belief that everyone has a right to be treated with dignity and respect, to equality of opportunity and justice, and that we should all contribute in the creation of more inclusive society where people from all backgrounds and viewpoints can fulfil their potential.
- (e) Our strategy is underpinned by our 9 Principles, our six key values and has three main strands – People, Community and the Environment.

PEOPLE AND ENVIRONMENTAL POLICY

Well-being of Our Staff

Through the Company's HR Strategy, the Directors aspire to become the region's employer of choice. We seek to achieve this by the application of best practice in the management and development of our People and having effective mechanisms in place to communicate with our staff and understanding their concerns. We encourage input from staff via regular team meetings and invite comment through our open door policy to all staff.

Supporting Local Businesses

Our policy is to deal with suppliers who themselves have adopted sustainable business practices, support the local community, use raw materials and/or supply products that are eco-friendly and save waste. We believe that by investing in the infrastructure of the local community, we can help to enrich our relationship with the local community and enhance the work that we do. We insist that all our staff use their best endeavours to follow these guidelines.

Our Environmental policy is principally concerned with the treatment of office waste and the promotion of recycling. We understand that we have a responsibility to protect the natural environment for future generations. We take this responsibility very seriously as a business.

Our objective is to measure and understand our environmental impact (collectively and individually), to inform and educate all our staff about it and to set ourselves achievable goals for reducing our environmental impact.

Our impacts

We have identified our most significant adverse environmental impact as depletion of natural resources through the procurement and use of goods and services and production of waste in our offices;

We have identified our positive environmental impact as the reduction of waste through the promotion of recycling and waste management activities;

Our commitments

We are committed to managing our environmental impacts and continuously improving our environmental performance by:

- *complying, as a minimum requirement, with relevant legislation, regulations and other relevant requirements;

- *minimising the amount of waste produced by way of reduction, recovery, reuse and recycling;

- *ensuring all employees are aware of environmental issues; and promoting environmentally-sensitive behaviour within the Company.

EQUALITY AND DIVERSITY POLICY STATEMENT

The Company is committed to avoiding discrimination in its dealings with customers, staff and all other third parties that have dealings with the Company. It is committed to promoting diversity in its professional activities.

Everyone at the Company is expected (and is legally required) to treat all others equally and with the same attention, courtesy and respect, regardless of their protected characteristics:

In addition, the Company will ensure that nobody with whom it has dealings will suffer any substantial disadvantage through any disability that they might have. The Company is committed to making reasonable adjustments for those with a disability in relation to job opportunities, promotion and training within the Company and the provision of services to customers.

All staff must be aware of the Company's policy in relation to all of the above acts. The policy deals with all professional dealings by staff with customers, other professionals and third parties, and so covers:

accepting instructions from customers;

using experts and counsel;

the provision of services to customers;

dealings with those representing others; and

interaction with everyone involved in or incidental to the provision of services by the Company.

The policy also extends to any future recruitment, training and promotion of people within the Company. In connection with both aspects, it is the case that all staff must comply with all current legal requirements.

DIVERSITY, INCLUSION AND EQUAL OPPORTUNITIES

We recognise that people are different – in terms of visible things as age, gender, ethnicity and physical appearance, as well as underlying things such as religion, nationality, social background and education

Diversity is valued at the Company. Everyone has the opportunity to join us, to develop with us and to fulfil their potential with us.

Our policy is to:

*Create a culture where everyone feels valued, included and respected

*Bring together teams of people with differing and complementary skills, ideas and experiences

*Ensure people from diverse backgrounds feel want to develop their careers with us;

*Use the diversity of our people, to develop creative solutions for our customers;

Diversity is an integral part of our business strategy and is critical to our success. We believe that promoting Diversity means providing Equality of Opportunity and creating an inclusive work environment where everyone has the opportunity to succeed. Our approach to Diversity, is to provide staff training, raise staff awareness and to embed Diversity into all that we do

We are a people business. We will only be able to maximise our people's contribution if we create and nurture an environment and culture which supports, respects and values all our differences, whether in gender, race, nationality, ethnic origin, religion, belief, age, marital status, colour, ability or disability, or sexual orientation.

Our Diversity and Equal Opportunities Policy applies to all aspects of recruitment, employment, promotion and training. Individuals are selected, promoted and treated on the basis of their abilities and merits and the needs of the Firm. Part of this is providing an inclusive work environment where everyone has the opportunity to succeed;

The provision of an inclusive and co-operative working environment where every employee is valued for his or her contribution and everyone has the opportunity to succeed is fundamental to our vision and values. It is a key ingredient in our business success. A strong and healthy focus on Diversity is not an option, it's a necessity.

To retain our talent, we need to work to encourage a culture where every individual feels highly valued and motivated, regardless of role. A focus on diversity and inclusion is critical to this.

Our approach to diversity and inclusion is important as it reflects who we are, and who we want to be, as a firm. If we are to achieve our aim to be the best business advisers we can be, we must recruit and retain the best possible range of talent.

Going Further

Of course, ensuring compliance with the law is vital but we want to do more than that. We promote Equality of Opportunity for fee earning and non-fee earning staff, as well as for those who apply for employment to the Company.

Recognition

Our aim is to attract and retain the most talented people, and part of this is providing a great place to work. So, to support fairness and equality and to encourage a healthy work-life balance, we continually monitor for improvements.

A policy in action

We do not stop there. Our policy of non-discrimination applies just as much to accepting customers' instructions, providing our services and appointing counsel and other experts as it does to employment matters.

Therefore, we are striving to put in place Best Practice policies and programmes around Diversity, Inclusion and Equal Opportunities, so that our customers and our staff, truly believe that we are committed to being outstanding in this area. We appreciate this is an ongoing journey and we are determined to be seen as a successful example of Diversity, Inclusion and Equal Opportunities in the business advice sector and the broader business community.

In turn, we hope our customers will feel they are partnering with a business advice services provider which consistently applies high standards in this area, and that our staff will remain proud to work for us, as an employer of choice.

These are the standards we set ourselves and we regularly review what we are doing to see if we are achieving them.

OUR NINE PRINCIPLES

1. Exceeding customers' expectations

We are committed to helping our customers achieve stated goals by providing commercially focused business advice of the highest quality, that consistently meets or beats expectations.

2. Providing Added Value

This is by going the extra mile for our customers, within the agreed fee structure. We offer more than just technical business knowledge, using our commercial experience.

3. Local excellence, high standards

We ensure we can benefit our customers by combining the highest standards of business knowledge with local excellence of service and by maintaining the depth, quality and scale of resources necessary to meet our customers' needs whenever, and wherever, they arise.

4. An ambition for success

Our over-arching vision is to be regarded as one of the region's leading niche business advice services providers

5. Investing in talent

To deliver on our commitment to our customers, we recruit and develop the best people. We believe that, by delivering great customer service, we will be involved in the most interesting and challenging customer work and, as a result, achieve the reputation and the high levels of profitability which are essential to attracting and retaining the best people.

6. An adaptable and approachable team

We believe in the power of collaboration, collegiality and teamwork and we have an open, approachable style. We expect our staff to be flexible and creative and to have the desire and drive to embrace new experiences and challenges. We require staff to put the interests of our customers and the Company before their own.

7. Thinking ahead

To be at the forefront of our business sector requires foresight, a desire to share ideas and a willingness to have a voice on issues of importance. We have the confidence to challenge existing thinking and to push out boundaries.

8. Strength through diversity

We are proud of our business and value the diversity of our people and our cultures., in our business, people succeed according to merits.

9. Community

Our strength comes from our 'one firm' approach and our partnership ethos. They underpin our ability to deliver excellent customer service and create a working environment where talented people can and do succeed. We are ambitious for our customers and ourselves but we understand the importance of making a positive impact on the Community at large.

STRONG ETHICS govern how we work with you

Strong ethics, such as working with integrity and providing customers with real transparency, guide us. We like to think they make us stand out, too.

We recruit only the best people at all levels of our business. We place a huge importance on teamwork.

We pride ourselves on our creative, 'smart' way of thinking - how we analyse instructions and set up our advice teams, how we find the optimal solutions to complex business issues, how we approach billing, how we service our customers' on-going needs and how we work with customers rather than just for them. No matter how challenging or complex the mandate, we are not satisfied until we have delivered the highest quality.

CLEAR COMMUNICATION is our focus

We do not hide behind jargon. We want customers to understand our opinions and our actions, so we give explanations to customers on a regular basis.

Using our experience and knowledge, we take the time to plan ahead for potential pitfalls so we can minimise any issues that may arise, and provide customers with a smoother, swifter service.

This is our open, honest, conscientious approach.

THE SIX KEY VALUES at the heart of our customer relationships

1. Commitment

Customers' needs and customers' best interests will be at the heart of everything we do. Customers can expect real professionalism from us as we aim to do all we can to achieve the results the customer is looking for.

We hope customers will be impressed enough with our service to work with us over many years, but we welcome customers even if they are looking for a one-off service.

2. Commerciality

Our approach is firmly rooted in building value for customers through the service they receive from us. Whether we are directly helping customers to maximise business opportunities or supporting them in their business or personal affairs, we will have commercial aspects in mind, as we use our expertise to find the best solution we can.

The evidence of this approach can be seen in many different ways, from dealing with customers' issues quickly and efficiently, to giving a timely, on-budget service and, where appropriate, through us managing and reducing any risk, so we can help customers in the best way possible.

3. Creativity

We do not offer a 'one size fits all' approach to our work - we know that all our customers' needs are different.

Business advice work isn't just about well-established paths. To offer customers the best service possible, we also think laterally and innovatively when required, using our knowledge, experience and skills to find a solution that is right for that customer.

4. Closeness

We want customers to enjoy working with us and to feel able to talk to us. With transparency and openness such a key part of our approach, clear and regular communication is vital to the way we do business. We keep customers informed at every stage, helping in a straightforward and straight-talking way.

5. Confidence

The best partnerships are based on trust, and we look to build this with our customers by the high level of service we offer and the in-depth knowledge and commitment to customers' best interests that we demonstrate. We want customers to experience an excellent service, not just once, but time and time again – and that is what we aim to provide.

6. Working hard to make a difference

We are keen to make a positive difference in the wider community, whether that is through using our expertise to help people who need it, or by simply giving our time where it is required. We do this in many different ways, from playing an active role in organisations to providing pro bono work (i.e. work we do without charge) for worthy causes.

To find out more about how our approach can work for you as a customer as part of a practical legal service for today, customers are invited to contact Euan Temple on **08452 41 40 45**

