

Source: People Operations Case Management System — Northbridge Advisory Partners Extracted by: HRIS Administrator, HR Systems Period: Q4 2025 – Q1 2026 Classification: Internal Confidential — Restrict Access

Case ER-2026-014

Case Type: Grievance **Date Opened:** 2026-01-22 **Current Status:** Under Review **Filed By:** Associate Consultant, Risk & Compliance Advisory **Responding Party:** Practice Head, Risk & Compliance Advisory **Assigned To:** Employee Relations Specialist, People Operations

Chronology of Events

Date	Event	Documented By
2025-11-03	Associate Consultant raised verbal concern to the Employee Relations Specialist about lack of regular check-ins since joining in August 2025	Employee Relations Specialist
2025-12-09	Associate Consultant emailed the Practice Head requesting a recurring fortnightly meeting; no response documented in system	Associate Consultant (email on file)
2026-01-08	Associate Consultant raised the issue again with the HR Business Partner during a scheduled 1:1	HR Business Partner (case note)
2026-01-22	Formal grievance submitted citing "persistent management absence and failure to provide reasonable supervision"	Associate Consultant (grievance form)
2026-02-05	Practice Head provided a written response: "I have an open-door policy. The Associate Consultant has not approached me directly during office hours."	Practice Head (written response)
2026-02-14	Employee Relations Specialist noted that the Practice Head's calendar shows 68% travel days in the Nov-Jan period	Employee Relations Specialist (calendar review)

Grievance Statement (Excerpt — Filed 2026-01-22)

"Since joining in August 2025 I have not had a single structured check-in with the Practice Head. I raised this verbally in November and by email in December. The email was not replied to. Other colleagues in the practice have confirmed similar experiences. I am filing this grievance because the lack of supervision has affected my ability to complete client deliverables and I have received no feedback on my work quality in five months."

Practice Head Response (Excerpt — Filed 2026-02-05)

"I operate an open-door policy and am available when in the office. The Associate Consultant joined during a busy client engagement period and I acknowledge the transition could have been smoother. I reject the characterisation that supervision has been absent — I am contactable by Teams and email at all times."

Notes

- No documented onboarding plan exists for this Associate Consultant in the HRIS
- The Associate Consultant's probation review (due at 6 months / February 2026) has not been completed
- A second team member in Risk & Compliance submitted an anonymous comment in the Q1 engagement survey referencing "cancelled check-ins" (survey reference: RC-FT-07)

Case ER-2026-017

Case Type: Workplace Conflict **Date Opened:** 2026-02-11 **Current Status:** Open **Parties Involved:** Senior Consultant (legacy Northbridge), Senior Consultant (former Meridian), Data & AI Advisory **Assigned To:** Employee Relations Specialist, People Operations

Chronology of Events

Date	Event	Documented By
2025-12-15	Project kick-off for internal analytics platform migration. Both Senior Consultants assigned as joint technical leads	Practice Head, Data & AI Advisory (project brief)
2026-01-09	The legacy Northbridge Senior Consultant emailed the Practice Head reporting "conflicting methodology decisions" and requesting a single lead be designated	Senior Consultant (email on file)
2026-01-14	Practice Head responded: "You are both experienced. Work it out between yourselves." No further action documented	Practice Head (email on file)
2026-01-28	The former Meridian Senior Consultant submitted a written complaint: "My counterpart has repeatedly dismissed my input in front of junior team members. Last Tuesday's design review was the third time I was talked over when presenting the Meridian approach."	Senior Consultant (written complaint)
2026-02-04	Junior Analyst (Data & AI Advisory) submitted an anonymous concern via the ethics hotline: "The tension between the two leads is affecting team morale. People are starting to pick sides."	Anonymous hotline report
2026-02-11	Employee Relations Specialist opened a formal case after reviewing the hotline report and prior correspondence	Employee Relations Specialist

Written Complaint Excerpt (Former Meridian Senior Consultant — 2026-01-28)

"I joined Northbridge as part of the Meridian acquisition in October 2025. Since being assigned to the analytics migration project I have consistently found my professional input dismissed by the other lead. The project methodology from Meridian was proven over three prior client engagements but has been rejected without evaluation. In the design review on 21 January, I was interrupted mid-presentation and told 'that's not how we do things here' in front of four junior team members. This has happened on at least three occasions."

Email from Legacy Northbridge Senior Consultant (2026-01-09)

"The current dual-lead arrangement is not working. The Meridian approach to documentation and sign-off is overly bureaucratic and slowing the project down. I've tried to find a middle ground but the other lead insists on their legacy process. Can we designate a single lead to avoid further delays?"

Notes

- The two Senior Consultants have not been offered mediation
- The Practice Head's January 14 response has been flagged by the Employee Relations Specialist as potentially insufficient under the Workplace Conflict Resolution Policy
- Project timeline is now 3 weeks behind the original schedule
- No integration protocol for combined Northbridge/Meridian teams was documented post-acquisition

Case ER-2026-019

Case Type: Performance / Disciplinary Concern **Date Opened:** 2026-03-03 **Current Status:** Open **Subject:** Consultant, Risk & Compliance Advisory **Raised By:** Practice Head, Risk & Compliance Advisory **Assigned To:** Employee Relations Specialist, People Operations

Chronology of Events

Date	Event	Documented By
2025-10-15	Consultant received "Meets Expectations" rating in annual review. No development actions documented	HRIS extract (annual review record)
2026-01-20	Practice Head emailed Employee Relations Specialist: "This consultant's work quality has dropped significantly. Two client reports had to be rewritten. I need to put them on a performance improvement plan immediately."	Practice Head (email on file)
01/02/2026	Employee Relations Specialist responded requesting documented evidence of performance concerns and details of any prior verbal feedback given to the Consultant	Employee Relations Specialist (email on file)
2026-02-18	Practice Head provided two client report redline documents but confirmed "No formal feedback conversations have taken place. I assumed the issues were obvious."	Practice Head (email on file)
03 March 2026	Employee Relations Specialist opened formal case noting that the Performance Improvement Policy requires documented verbal feedback and a formal discussion before any PIP can be initiated	Employee Relations Specialist
2026-03-10	Consultant was informed by the Practice Head in a Teams message that they were "being put on a PIP" — Employee Relations Specialist was not consulted before this communication	Practice Head (Teams message screenshot on file)

Practice Head Email Excerpt (2026-01-20)

"The Consultant's deliverable quality has declined noticeably since November. Two client reports needed substantial rework — one was sent to the client with incorrect benchmarking data, and the other missed the agreed structure entirely. I need to move to a PIP as soon as possible."

Employee Relations Specialist Case Note (2026-03-03)

"The Practice Head has not followed the required process. Per the Performance Improvement Policy (Section 3.2), a PIP requires: (1) documented verbal feedback with date and content, (2) a formal meeting with the employee to discuss concerns, and (3) a reasonable improvement period with clear milestones. None of these steps have occurred. Additionally, the Practice Head informed the Consultant of the PIP via Teams message on 10 March without consulting the Employee Relations Specialist or the HR Director, which contravenes Section 3.4 of the same policy."

Notes

- The Consultant's October 2025 review shows no documented performance concerns
- The two client reports cited by the Practice Head date from November and December 2025 — a 2-3 month gap before the issue was raised with the Employee Relations Specialist
- The Consultant has not been given the opportunity to provide their account of the performance concerns
- This is the same Practice Head named in Case ER-2026-014 (grievance about management absence)

Case ER-2026-021

Case Type: Grievance **Date Opened:** 2026-03-18 **Current Status:** Open **Filed By:** Consultant, Data & AI Advisory **Responding Party:** Practice Head, Data & AI Advisory / HR Director, People & Culture **Assigned To:** Employee Relations Specialist, People Operations

Chronology of Events

Date	Event	Documented By
2026-02-28	Consultant discovered a salary discrepancy during an informal conversation with a peer in the same role and grade	Consultant (grievance form)
2026-03-04	Consultant raised the concern informally with the HR Business Partner, requesting a pay review	HR Business Partner (case note)
2026-03-11	HR Business Partner confirmed that the peer (same grade, similar tenure) is paid 18% more. The peer joined via the Meridian acquisition with a protected salary arrangement	HR Business Partner (case note)
18-03-2026	Consultant filed a formal grievance citing "pay inequity for substantially similar work" and requesting immediate rectification	Consultant (grievance form)
2026-03-25	Compensation Analyst provided a benchmarking extract showing the Consultant's salary sits at the 32nd percentile of the market range for the role, while the peer sits at the 58th percentile	Compensation Analyst (benchmarking extract)

Grievance Statement (Excerpt — Filed 2026-03-18)

"I have been employed as a Consultant in Data & AI Advisory for two years and eight months. I recently became aware that a colleague performing substantially the same role at the same grade level is paid approximately 18% more than me. The HR Business Partner confirmed this discrepancy and noted the colleague's salary was 'protected' as part of the Meridian acquisition arrangement. I do not believe acquisition-era salary protections constitute a valid justification for ongoing pay inequity when two individuals are performing the same role. I request an immediate pay review and adjustment."

Compensation Analyst Benchmarking Note (2026-03-25)

"Confirmed: the grievant sits at P32 of the external market range for Consultant-level roles in data advisory (band: \$95,000–\$128,000; grievant salary: \$98,500). The comparator colleague sits at P58 (\$116,200). The firm-wide compensation benchmark gap is 14% against a target of 5%. The Data & AI Advisory practice has the widest internal pay spread at this grade level. Note: the Meridian salary protection clause expires at the next annual review cycle (July 2026) but there is no documented process for what happens after expiry."

Notes

- The Meridian acquisition salary protection terms were agreed by the HR Director in October 2025 but have not been communicated to non-Meridian employees
- No formal pay equity audit has been conducted since the acquisition
- The Consultant's last salary adjustment was a 3% annual increase in July 2025
- A free-text survey comment from Data & AI Advisory in the Q1 engagement survey states: "My total compensation has barely moved in three years. The annual increase last cycle was 3%" — this may or may not be from the same individual

AGASI AiOS — Sample material. For illustrative purposes. All data is fictional.