

Prepared by: Employee Relations Specialist, People Operations — Northbridge Advisory Partners Date: 2026-04-07 Review Period: Q4 2025 – Q1 2026 Cases in Scope: 4 Classification: Internal Confidential — Restrict Access

Case ER-2026-014

Case Overview

- **Case Type:** Grievance
- **Date Opened:** 2026-01-22
- **Current Status:** Under Review
- **Parties Involved:** Associate Consultant (Risk & Compliance Advisory), Practice Head (Risk & Compliance Advisory)

Documented Facts

#	Date	Event	Source Document	Verbatim Excerpt
1	2025-11-03	Verbal concern raised about absence of regular check-ins	Employee Relations Specialist case note	"Associate Consultant raised verbal concern... about lack of regular check-ins since joining in August 2025"
2	2025-12-09	Written request for fortnightly meetings sent to Practice Head; no response documented	Associate Consultant email on file	"Associate Consultant emailed the Practice Head requesting a recurring fortnightly meeting; no response documented in system"
3	2026-01-08	Issue escalated to HR Business Partner during scheduled 1:1	HR Business Partner case note	"Associate Consultant raised the issue again with the HR Business Partner during a scheduled 1:1"
4	2026-01-22	Formal grievance submitted	Grievance form	"persistent management absence and failure to provide reasonable supervision"
5	2026-02-05	Practice Head response submitted	Written response	"I have an open-door policy. The Associate Consultant has not approached me directly during office hours."
6	2026-02-14	Calendar review confirms 68% travel days for Practice Head (Nov–Jan)	Employee Relations Specialist calendar review	"Practice Head's calendar shows 68% travel days in the Nov-Jan period"

Relevant Policies

Policy Section	Relevance to Case
Section 2: Grievance Policy (2.3)	Formal grievance procedure — determines timeline and process obligations
Section 3: Performance Management (3.1)	Annual review and documented check-in expectations for line managers
Section 5: Workplace Conflict Resolution (5.2)	Early intervention obligation when management becomes aware of issues

Open Items

- Probation review (due February 2026 at 6-month mark) has not been completed
- No documented onboarding plan exists for this Associate Consultant in the HRIS
- Investigation into Practice Head's compliance with supervision expectations is pending
- Grievance hearing has not yet been scheduled (15-working-day investigation window applies per Section 2.3)

Case ER-2026-017

Case Overview

- **Case Type:** Workplace Conflict
- **Date Opened:** 2026-02-11
- **Current Status:** Open
- **Parties Involved:** Senior Consultant — legacy Northbridge (Data & AI Advisory), Senior Consultant — former Meridian (Data & AI Advisory)

Documented Facts

#	Date	Event	Source Document	Verbatim Excerpt
1	2025-12-15	Both Senior Consultants assigned as joint technical leads on analytics migration project	Practice Head project brief	"Both Senior Consultants assigned as joint technical leads"
2	2026-01-09	Legacy Northbridge Senior Consultant reports conflicting methodology decisions	Email on file	"conflicting methodology decisions"; "The Meridian approach to documentation and sign-off is overly bureaucratic and slowing the project down"
3	2026-01-14	Practice Head declines to designate a single lead	Email on file	"You are both experienced. Work it out between yourselves."
4	2026-01-28	Former Meridian Senior Consultant files written complaint about being dismissed in front of junior staff	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."
5	2026-02-04	Anonymous ethics hotline report about team morale impact	Ethics hotline report	"The tension between the two leads is affecting team morale. People are starting to pick sides."
6	2026-02-11	Formal case opened by Employee Relations Specialist	Employee Relations Specialist case note	—

Relevant Policies

Policy Section	Relevance to Case
Section 5: Workplace Conflict Resolution (5.2)	Early intervention obligation — Practice Head's 14 Jan response may not meet the standard
Section 5: Workplace Conflict Resolution (5.3)	Mediation has not been offered despite escalation
Section 1: Code of Conduct (1.1)	Professional standards expectation regarding conduct in meetings

Open Items

- Mediation has not been offered to either party
- No post-acquisition integration protocol exists for combined Northbridge/Meridian teams
- Project is 3 weeks behind schedule; business impact assessment not yet completed
- Practice Head's initial response ("Work it out between yourselves") has been flagged as potentially insufficient under Section 5.2

Case ER-2026-019

Case Overview

- **Case Type:** Performance / Disciplinary Concern
- **Date Opened:** 2026-03-03
- **Current Status:** Open
- **Parties Involved:** Consultant (Risk & Compliance Advisory), Practice Head (Risk & Compliance Advisory)

Documented Facts

#	Date	Event	Source Document	Verbatim Excerpt
1	2025-10-15	Consultant received "Meets Expectations" in annual review; no development actions documented	HRIS extract	"Meets Expectations" rating; no development actions field populated
2	2026-01-20	Practice Head requests immediate PIP citing declined work quality	Email on file	"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."
3	2026-02-01	Employee Relations Specialist requests documented evidence and prior feedback	Email on file	"Requesting documented evidence of performance concerns and details of any prior verbal feedback given to the Consultant"
4	2026-02-18	Practice Head provides redline documents but confirms no prior formal feedback	Email on file	"No formal feedback conversations have taken place. I assumed the issues were obvious."
5	2026-03-03	Formal case opened; procedural non-compliance noted	Employee Relations Specialist case note	"Performance Improvement Policy requires documented verbal feedback and a formal discussion before any PIP can be initiated"
6	2026-03-10	Practice Head communicated PIP to Consultant via Teams without Employee Relations Specialist approval	Teams message screenshot on file	Consultant informed "being put on a PIP" — Employee Relations Specialist not consulted

Relevant Policies

Policy Section	Relevance to Case
Section 3: Performance Management (3.2)	Three required pre-PIP steps not completed: no documented verbal feedback, no formal discussion, no improvement period
Section 3: Performance Management (3.4)	PIP communicated without Employee Relations Specialist written approval — direct policy contravention
Section 3: Performance Management (3.1)	October 2025 review documented no concerns, creating an evidence gap

Open Items

- The Consultant has not been given the opportunity to provide their account
- The 2-3 month gap between the cited performance issues (Nov–Dec 2025) and the Practice Head raising the concern (Jan 2026) is unexplained
- The unauthorised PIP communication on 10 March creates a procedural complication — the Consultant may now believe they are on a formal PIP when no valid PIP exists
- This is the same Practice Head involved in Case ER-2026-014 (grievance about management absence)

Case ER-2026-021

Case Overview

- **Case Type:** Grievance
- **Date Opened:** 2026-03-18
- **Current Status:** Open
- **Parties Involved:** Consultant (Data & AI Advisory), Practice Head (Data & AI Advisory), HR Director (People & Culture)

Documented Facts

#	Date	Event	Source Document	Verbatim Excerpt
1	2026-02-28	Consultant discovers salary discrepancy during informal peer conversation	Grievance form	"discovered a salary discrepancy during an informal conversation with a peer in the same role and grade"
2	2026-03-04	Informal pay review request raised with HR Business Partner	HR Business Partner case note	"Consultant raised the concern informally... requesting a pay review"
3	2026-03-11	HR Business Partner confirms 18% pay gap; peer has Meridian acquisition salary protection	HR Business Partner case note	"peer (same grade, similar tenure) is paid 18% more. The peer joined via the Meridian acquisition with a protected salary arrangement"
4	2026-03-18	Formal grievance filed citing pay inequity	Grievance form	"pay inequity for substantially similar work"
5	2026-03-25	Compensation Analyst confirms grievant at P32, comparator at P58 of market range	Benchmarking extract	"grievant sits at P32 of the external market range... The comparator colleague sits at P58 (\$116,200). The firm-wide compensation benchmark gap is 14% against a target of 5%."

Relevant Policies

Policy Section	Relevance to Case
Section 6: Equal Pay and Compensation Equity (6.1)	Commitment to comparable compensation for substantially similar work at the same grade
Section 6: Equal Pay and Compensation Equity (6.3)	Acquired employee salary protections — protection terms documented but no operational procedure for post-expiry
Section 2: Grievance Policy (2.3)	Formal grievance procedure applies; 20-working-day benchmarking review period per Section 6.2

Open Items

- Meridian salary protection terms were not communicated to non-Meridian employees
- No formal pay equity audit has been conducted since the acquisition
- The salary protection clause expires at the next annual review cycle (July 2026) but no transition process is documented
- Grievant's last salary adjustment was 3% in July 2025 — below the firm-wide compensation benchmark gap of 14%
- The Q1 engagement survey free-text comment ("My total compensation has barely moved in three years") may be from the same individual — unconfirmed