

*Compiled by: HR Director, People & Culture — Northbridge Advisory Partners Date: 2026-04-04 Classification: Internal Confidential Purpose: Collected change requests from stakeholders for the upcoming policy review cycle. Requests are listed as received; not all have been validated or prioritised.*

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## Request 1: Mandatory Pre-PIP Documentation Requirement

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**Submitted by:** Employee Relations Specialist, People Operations **Date:** 2026-03-28 **Policy Section:** Section 3 — Performance Management (S3.2, S3.4)

**Request:** Revise S3.2 to require a minimum of two documented feedback conversations before a PIP can be initiated. Add a mandatory sign-off by the Employee Relations Specialist before any PIP is communicated to the employee.

**Justification:** Case ER-2026-019 demonstrated that the current policy allows managers to initiate a PIP without documented prior conversations and without HR approval. The Practice Head in Risk & Compliance Advisory communicated a PIP via Teams message that had no procedural validity. This created a remediation burden and exposed the firm to counter-grievance risk.

**Additional context:** The Employee Relations Specialist also notes that the current policy does not mandate a format for documenting feedback conversations. Different managers use different methods (email, Teams, handwritten notes, nothing). A standardised template would reduce ambiguity.

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## Request 2: Post-Acquisition Integration Protocol

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**Submitted by:** Practice Head, Data & AI Advisory **Date:** 2026-03-30 **Policy Section:** Section 5 — Workplace Conflict Resolution (S5.4)

**Request:** Replace the current S5.4 (which contains no actionable requirements) with a documented integration protocol for teams that include employees from acquired firms. The protocol should cover reporting structures, project allocation, shared team norms, and a mandatory check-in schedule for the first 12 months post-acquisition.

**Justification:** The workplace conflict case in Data & AI Advisory (ER-2026-017) between legacy Northbridge and former Meridian employees had no integration framework to reference. The Practice Head had to improvise a mediation approach because no protocol existed. The team morale impact was confirmed by a hotline report and the engagement survey flagged cultural fragmentation in this practice.

**Additional context:** The Practice Head requests that the protocol be developed jointly by HR and practice leadership, not imposed top-down by HR alone. They also note that the Meridian acquisition was completed over 12 months ago, so the protocol should address both new integrations and retrospective application to existing mixed teams.

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## Request 3: Salary Protection Expiry Procedure

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**Submitted by:** Compensation Analyst, Total Rewards **Date:** 2026-04-01 **Policy Section:** Section 6 — Equal Pay & Compensation Equity (S6.3)

**Request:** Add a documented procedure for transitioning acquired employees from protected salary terms to the standard pay framework when the protection period expires. The procedure should include: notification timeline, gap analysis methodology, transition options, and an appeals process.

**Justification:** The Meridian salary protection clause expires at the July 2026 review cycle. Case ER-2026-021 revealed an 18% pay gap between same-grade employees caused by the protection arrangement. Without a documented transition process, the firm risks either perpetuating the inequity or generating new grievances when protections lapse.

**Additional context:** The Compensation Analyst notes that the current policy (S6.3) acknowledges that salary protections exist but does not address expiry at all. The gap has existed since the acquisition but was not visible until the pay equity grievance surfaced it. The analyst recommends including a firm-wide pay equity audit step before any transitions are finalised.

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## Request 4: Grievance Investigation Overrun Procedure

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**Submitted by:** HR Director, People & Culture **Date:** 2026-04-03 **Policy Section:** Section 2 — Grievance Procedure (S2.3)

**Request:** Add a clause requiring formal notification to the employee when a grievance investigation will exceed the 15-working-day window. Include a requirement to provide a revised estimated completion date and escalation criteria for investigations that exceed twice the stated timeline.

**Justification:** Case ER-2026-014 has exceeded the 15-working-day window with no formal notification to the grievant. The current policy is silent on what happens when the timeline is breached. The Escalation & Severity Criteria specify that cases open beyond twice the response timeline escalate one severity level, but this is not reflected in the Grievance Procedure section itself — creating a disconnect between the policy and the escalation framework.

**Additional context:** The HR Director notes this is a straightforward fix but it has been overlooked because the Grievance Procedure was last reviewed in March 2024 and the escalation criteria were updated in January 2026 without a corresponding policy amendment.

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## Request 5: Engagement Survey Correlation Trigger — Formalisation

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**Submitted by:** Employee Relations Specialist, People Operations **Date:** 2026-04-03 **Policy Section:** Escalation & Severity Criteria (referenced in Sections 2, 3, 5)

**Request:** Formalise the engagement survey correlation trigger that was informally added to the escalation criteria in January 2026. Define what constitutes sufficient correlation between a case theme and a survey risk flag, and specify the action required when the trigger is met.

**Justification:** Three of four current ER cases have direct correlations with engagement risk flags, but the trigger has never been formally applied. The Employee Relations Specialist attempted to apply the criterion but found the wording ambiguous — specifically, the threshold for "direct correlation" is not defined, and there is no documented workflow for what happens after the flag is raised.

**Additional context:** The Employee Relations Specialist recommends cross-referencing this request with the policy update for Sections 2, 3, and 5, since the engagement correlation trigger affects case severity assessment across all three areas. They also flag that the trigger was added without going through the normal policy change approval process, so it lacks formal status.

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