



**best companies™**

**Subscription  
Terms of Service**

Release: April 2026  
Version 1.7

## Introduction

Hello,

We are Best Companies, the workplace engagement specialists. Our mission is to create better workplaces worldwide. We believe that there's a powerful connection between employees that are happier, more secure, and ultimately more productive, on an organisation's overall 'health'.

Our Founder and CEO, Jonathan, pioneered the development of a unique, world-class methodology that has become the gold standard for measuring, improving, and recognising workplace excellence in the UK.

Today we work with some of the world's leading organisations, using that methodology to underpin our comprehensive suite of insight-driven products. These products help organisations build future-ready workforces, redefine people management expectations, and foster organisational agility and resilience.

We conduct research and data analysis, processing personal data to equip your organisation with tools and expertise to monitor and improve engagement over time. Our services provide accurate insights into engagement levels, helping employers shape and meet their people strategy needs.

We also use statistical data for research, aiming to discover new information, draw conclusions, and support decision-making to better understand employee engagement and its impact on overall Organisational Health.

To support your compliance and due diligence efforts, we have a suite of documents and articles available. Please visit our Trust Centre <https://www.b.co.uk/compliance/trust-centre> to find out more.

Thank you for considering Best Companies as your partner of choice.

## The Best Companies Team

## SUBSCRIPTION TERMS OF SERVICE

### 1. INTERPRETATION

1.1 The rules of interpretation set out below apply to this Agreement (including the schedules where applicable) and the following terms have the following meaning:

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|------------------------------|---|
| <b>“Accolade”</b>            | Awarded recognition following evaluation by Best Companies, including but not limited to the accreditation scheme, or a place on any List as published by Best Companies from time to time.   |
| <b>“Accreditation Year”</b>  | means the fixed annual cycle used by Best Companies for awarding and recognising Accolades, commencing on 1 October and ending on 30 September;   |
| <b>“Additional Services”</b> | any services agreed to be provided by Best Companies to the Client on their written instruction, which are not specified in the Agreement, including (but not limited to) bespoke reporting and Workshop(s), that are chargeable to the Client and invoiced separately which shall be deemed to be supplied upon and subject to these Conditions;   |
| <b>“Additional Charges”</b>  | means charges quoted for Additional Services or charged on a time and materials basis at Best Companies then prevailing rates for Additional Services if not set out in the Proposal;   |
| <b>“Agreement”</b>           | means the legally binding contract between Best Companies and the Client comprising these Conditions, the Schedules (where applicable), any service description or product package presented to the Client at the point of contracting, and any documents incorporated by reference.<br>The Agreement is formed when the Client accepts the Services through any of the following methods:<br>a) Acceptance via an online Agreement link issued by Best Companies, where the Services package and a link to these Conditions are presented;<br>b) Electronic acceptance within the Best Companies platform; or<br>c) Signature (including electronic signature such as DocuSign) of an Agreement that includes these Conditions and any accompanying Schedule describing the purchased Services. Any reference to “acceptance”, “execution” or “signature” shall be interpreted to include any of the methods listed above; |
| <b>“Annual Winter Break”</b> | the period starting Christmas Eve, up until and including the New Year’s Day Bank Holiday;  |

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| <b>“Authorised Personnel”</b>              | the named personnel as nominated by the Client, Best Companies may liaise with in relation to this Agreement and the Services;   |
| <b>“Best Companies”</b>                    | Best Companies Limited a company registered in England and Wales under company number (03916471) whose registered office is at Hamilton House, Rackery Lane, Llay, Wrexham, LL12 0PB, a Party to this Agreement.   |
| <b>“Business Day”</b>                      | a day, other than a Saturday, Sunday or public holiday when banks in England and Wales are open for business;  |
| <b>“Client”</b>                            | means the person, firm, company or organisation entering into the Agreement with Best Companies through any approved acceptance method.  |
| <b>“Conditions”</b>                        | the terms and conditions set out in this document, as amended from time to time in accordance with Clause 14.19 (changes required by Data Protection Legislation) or Clause 20 (Variation), where applicable;  |
| <b>“Controller and Processor”</b>          | as defined in Data Protection Legislation;   |
| <b>“Crown Commercial Service” or “CSS”</b> | means the executive agency of the Cabinet Office responsible for centralised commercial and procurement services for the UK public sector.   |
| <b>“Cultural Insight”</b>                  | Best Companies Cultural Insight, a questionnaire completed by the Client providing information regarding the Client’s business and operation;  |
| <b>“Data Protection Legislation”</b>       | All applicable data protection and privacy legislation in force from time to time in the UK including: the UK General Data Protection Regulation (UK GDPR); the Data Protection Act 2018; the Privacy and Electronic Communications Regulations 2003 (implementing Directive 2002/58/EC, as amended); and any amendments made by the Data (Use and Access) Act 2025, its successor statutes, or other future legislation.. |
| <b>“Deliverables”</b>                      | Best Companies’ reporting documentation, tools, sessions, presentations, services, (whether in hard copy, visual, audio or electronic format), developed by Best Companies or its agents, subcontractors, consultants and Employees, provided under license to the Client, for understanding levels of Employee engagement through the services and products provided by Best Companies.                                   |
| <b>“Diversity Questionnaire”</b>           | set questions, which can be added on request as an extension to the Employee Survey, being designed to inform the Client (with anonymous reporting), of the  |

ethnic, social and cultural diversity within a workplace of those that choose to respond;

**“Effective Date”**

means the date on which the Client accepts the Agreement through any valid acceptance method, being: (a) acceptance via an online Agreement link; (b) electronic acceptance within the Best Companies platform; or (c) signature (including electronic signature) of the Agreement;

**“Employee(s)”**

the Client’s employees;

**“Employee Survey” or “Survey”**

the Survey form known as the b-Heard Survey provided as is, in the requested format. It includes, but not limited to, set statements required for the Services, a Diversity Monitoring Form, (where requested by the Client), and set statements for further research purposes. Employees respond about their experience of working for the Client’s business;

**“G-Cloud”**

means the UK Government’s Crown Commercial Service cloud services procurement framework, through which UK public-sector organisations purchase cloud-based software, platforms, and support services.

**“Grace Period”**

the period of 30 days following expiry of the Initial Subscription Term and any Renewal Period during which the Client may elect to terminate the Agreement in accordance with clause 3.1 during which period Services may be accessed with reduced functionality.

**“Initial Subscription Term”**

the initial agreed term of this Agreement;

**“Input Material”**

all documents, information and data provided by the Client relating to the Services including completed data reports, information submitted via completion of Employee Surveys, Cultural Insight and any specifications;

**“Intellectual Property Rights”**

all patents, rights to inventions, utility models, copyright and related rights, trademarks, service marks, trade business and domain names, rights in trade dress or get-up, rights in goodwill or to sue for passing off, unfair competition rights, rights in designs, rights in computer software, database rights, rights in confidential information (including know-how and trade secrets) and any other intellectual property rights, in each case whether registered or unregistered and including all applications for renewals or extensions of such rights and all similar or equivalent rights or forms of protection in any part of the world;

**“List”**

the categories of List published by Best Companies from time to time including (but not limited to) “The Best Companies to Work For” and any replacement,

equivalent or additional List as may be made available from time to time;

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| <b>“Materials”</b>                         | Best Companies service documents and products developed by Best Companies or its agents, subcontractors, consultants and Employees, for Best Companies to administer and conduct its Services to the Client, including but not limited to the Survey, instructions and guidance;  |
| <b>“Party” and “Parties”</b>               | Best Companies and Client, each individually referred to as a “Party” and collectively as the “Parties”.  |
| <b>“Personal Data”</b>                     | as defined in Data Protection Legislation;  |
| <b>“Personal Data Breach”</b>              | a breach of security leading to the accidental or unlawful destruction loss, alternation, unauthorised disclosure of, or access to, Personal Data transmitted, stored or otherwise processed;   |
| <b>“Processing, Processes and Process”</b> | either any activity that involves the use of Personal Data or as the Data Protection Legislation may otherwise define processing, processes or process. It includes any operation or set of operations which is performed on Personal Data or on sets of Personal Data, whether or not by automated means, such as collection, recording, organisation, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or destruction. Processing also includes transferring Personal Data to third parties; |
| <b>“Preferential Rate”</b>                 | Any special terms, offered at Best Companies sole discretion, which may include but not limited to an extended term, fixed rate or non-standard payment schedule.   |
| <b>“Recognition Year”</b>                  | the calendar year in which each List is published;  |
| <b>“Renewal Period”</b>                    | the period described in clause 3;   |
| <b>“Rules of Engagement”</b>               | the rules set out in schedule 1 of the Agreement and as amended from time to time by Best Companies and as they apply to Accreditation and List;  |
| <b>“Services”</b>                          | the Services purchased by the Client, which shall include the Deliverables, Standard Support Services and any Additional Services.  |
| <b>“Strategy Day”</b>                      | up to a maximum of 10 (ten) company away days held throughout a calendar year (1 <sup>st</sup> January to 31 <sup>st</sup> December) on what would normally be considered a Business Day, to provide or facilitate business planning, company training, team building, wellbeing, specific events and as required by Best Companies;  |

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|---|---|
| <b>“Standard Support Services”</b>          | the standard telephone and online support made available to the Client by Best Companies, details of which are set out in clause 4;   |
| <b>“Standard Contractual Clauses (SCC)”</b> | a) the standard contractual clauses approved by the European Commission for the transfer of Personal Data from the European Economic Area to processors established in third countries as set out in the modules C2C (controller-to-controller transfers) and C2P (controller-to-processor transfers), as set out in the Annex of Commission Implementing Decision 914 / 2021 pursuant to regulation EU 679/2016 including the International Data Transfer Agreement and Addendum clauses issued by the Information Commissioners Office under s119A(1) Data Protection Act 2018 as it is revised under section 18 of the mandatory clauses to the Addendum ; or<br>b) equivalent provisions of the third country of the recipient of any such transfers as are consistent with the UK Data Protection Legislation; |
| <b>“Subscription Fee”</b>                   | the non-refundable fee payable in advance for the Services, as communicated to the Client at the time of entering into the Agreement, and payable annually for each Renewal Period;   |
| <b>“Subscription Term”</b>                  | has the meaning given in clause 3 (being the Initial Subscription Term together with any subsequent Renewal Periods).   |
| <b>“Subscription”</b>                       | describes the duration for which the subscription remains active;   |
| <b>“Survey Period”</b>                      | the period between Survey delivery to Employees for submission, to the date of Survey close, agreed between the Parties;  |
| <b>“VAT”</b>                                | Value Added Tax as defined by the Value Added Tax Act 1994 chargeable under the laws of England and Wales for the time being and any similar additional or alternative tax;   |
| <b>“Writing”</b>                            | includes email, subject to the provision as to the service of notices as set out below.   |
| <b>“Workshop(s)”</b>                        | An in person or online event hosted by Best Companies, including but not limited to insights, workshops, conferences, project planning and/or training sessions which falls under Additional Services.  |

- 1.2 Clause, Schedule and paragraph headings shall not affect the interpretation of this Agreement.
- 1.3 References to a person include a natural person, corporate or unincorporated body (whether or not having a separate legal personality).

- 1.4 Reference to a statute or statutory instrument includes any amendment or replacement provision.
- 1.5 The Schedules to this Agreement form part of it where relevant. In the event that there is any conflict between a provision of the main body of the Agreement and the Schedules, the terms of the main body of the Agreement shall take precedence.
- 1.6 A reference to a company shall include any company, corporation or other body corporate, wherever and however incorporated or established.
- 1.7 Unless the context otherwise requires, words in the singular, shall include the plural and in the plural shall include the singular.
- 1.8 Unless the context otherwise requires, a reference to one gender shall include a reference to the other genders.
- 1.9 This Agreement shall be binding on, and to the benefit of, the Parties to this Agreement and their respective personal representatives, successors and permitted assigns, and references to any Party shall include that Party's personal representatives, successors and permitted assigns.
- 1.10 A reference to writing or written includes email.
- 1.11 Any obligation in the Agreement on a person to do something or not to do something includes an obligation not to agree, allow, permit, encourage or acquiesce in that thing being done or not done.
- 1.12 References to Conditions and Schedules are to the Conditions and Schedules of the Agreement.
- 1.13 Only the pricing, Subscription, and payment-related terms expressly presented to the Client at the point of acceptance or set out in Schedule 3 (where applicable), shall apply. Notwithstanding clause 1.5, those terms shall, from commencement of this Agreement, take precedence over clauses 3.1, 7.2, 7.7, 7.8, 7.8.1 and 13.3 to the extent of any inconsistency. No amendments to these terms shall be valid unless agreed by both Parties through a formal variation to this Agreement in accordance with clause 20.

## **2. APPLICATION OF CONDITIONS**

- 2.1 The Conditions including the Schedules of this Agreement where relevant shall:
  - (a) apply to and be incorporated into the Agreement; and
  - (b) prevail over any inconsistent terms or conditions contained, or referred to, in the confirmation of an order, acceptance of a quotation, specification or any other document supplied by the Client, or implied by law, trade custom, practise or course of dealing; take precedence over any previous agreements from the Effective Date.
  - (c) This Agreement will honour any previously agreed or remaining months of an Initial Subscription Term or Renewal Period, unless otherwise agreed in writing.
  - (d) Where any Preferential Rate is provided, the Agreement shall no longer be deemed a Renewal Period but shall be interpreted as an Initial Subscription Term, commencing from the end date of any previously agreed Renewal Period or Initial Subscription Term, unless the pre-existing Subscription Term has terminated. Equally, where a Subscription exceeds twelve (12) months, that term shall be deemed an Initial Subscription Term.
  - (e) For the avoidance of doubt, subject to clause 14.5, the Parties intend that the Standard Contractual Clauses, should become effective and the parties shall comply with clause 14.4, if

Article 44 of the General Data Protection Regulation (the “GDPR”) applies to a transfer of Personal Data from the EEA to the UK, because the UK has left the European Union, and the transfer is not permitted under Article 45.

### **3. COMMENCEMENT AND DURATION**

3.1 This Agreement shall, commence on the Effective Date and shall continue for the Initial Subscription Term and, thereafter, this Agreement shall automatically renew for successive periods of 12 (twelve) months (each a Renewal Period), unless:

- (a) the Client opts out of renewal before the renewal commitment point as per clause 3.4; or
- (b) the Client has elected automatic renewal and later opts out before the renewal commitment point; or
- (c) a grace period is applied and the Client does not renew within that grace period; or
- (d) this Agreement is otherwise terminated in accordance with its terms;

Together, the Initial Subscription Term, any Renewal Periods, and any grace period constitute the Subscription Term.

3.2 The Client may opt into or out of automatic renewal by either:

- (a) Giving written notice; or
- (b) Using the Client dashboard provided as part of the Deliverables.

Any such change will take effect at the end of the current Subscription Term, provided it is made before the renewal commitment point.

3.3 Where a Grace period is applied at Best Companies’ discretion, Services will continue with reduced functionality for up to thirty (30) days. If the Client renews during the Grace period, the Renewal Period will be deemed to have commenced on the first day of the Grace Period.

3.4 Sixty (60) days prior to the end of the current Subscription (whether the Initial Subscription Term or any Renewal Period), the Client shall become contractually committed to the upcoming Renewal Period. From this point, the Agreement shall renew automatically, and the applicable Subscription Fee and the selected Services for the Renewal Period shall become due in accordance with clause 7.

3.5 Best Companies shall issue the Client with three (3) renewal notifications by email prior to the commencement of the 60-day commitment window, confirming that the Agreement is approaching the point at which the next Renewal Period will become contractually binding. Email notices will be deemed delivered in accordance with clause 27.

3.6 The Client may opt out of automatic renewal at any time prior to the 60-day commitment point. Where automatic renewal is opted out, the Agreement shall end at the expiry of the current Subscription Term, subject to clause 3.7 below.

3.7 Best Companies may, at its sole discretion, offer a grace period of up to thirty (30) days following the expiry of the Subscription Term during which Services may continue with reduced functionality. During this grace period, the Client may elect to renew the Agreement. Where the Client does not renew within the grace period (if applied), the Agreement shall terminate.

### **4. BEST COMPANIES OBLIGATIONS**

4.1 Best Companies shall provide the Materials required, to provide the agreed Services and Deliverables for the Subscription Term to the Client, provided the Client complies with its obligations under the

Agreement and complies with the Rules of Engagement where applicable.

- 4.2 Best Companies shall provide access to the Standard Support Services between the hours of 9.00 am and 5.00 pm GMT/BST on Business Days save for Strategy Days and Annual Winter Break.
- 4.3 Unless the minimum number of Surveys are returned, Best Companies will not be able to and is therefore not under an obligation to report on the Client's level of engagement or provide any information or analysis based on the Surveys returned. For the avoidance of doubt in that event the Client will not be entitled to either a total or partial refund of fees.

## **5. CLIENT'S OBLIGATIONS**

- 5.1 The Client shall co-operate with Best Companies in all matters relating to the Services;
- 5.2 The Client shall provide to Best Companies, in a timely manner, such Input material and such other information as Best Companies may reasonably require to conduct the Services;
- 5.3 The Client shall comply with the Rules of Engagement set out in Schedule 1, which govern all requirements relating to the delivery, distribution and completion of the Employee Survey.
- 5.4 The Client shall complete, review and update the Cultural Insight prior to the survey close, or within any alternative deadline notified by Best Companies in writing.
- 5.5 The Client shall assist with the delivery of the Best Companies data protection privacy notice to all Employees, which can be found by visiting [www.b.co.uk/privacy-notice](http://www.b.co.uk/privacy-notice).

## **6. REVIEW OF RULES OF ENGAGEMENT**

- 6.1 Best Companies shall review the Rules of Engagement from time to time and shall notify the Client with at least 30 (thirty) days' notice, where impacted by the change.

## **7. CHARGES AND PAYMENT**

- 7.1 The Client shall pay to Best Companies the charges communicated at the point of contracting, including the Subscription Fees, any agreed fees for Additional Services, and VAT at the prevailing rate. These charges shall be as displayed within the Client Dashboard at the time of acceptance, set out in Schedule 3 where applicable, or otherwise agreed in writing between the Parties.
- 7.2 Subject to clause 7.8, terms of payment are 30 (thirty) days from the date of each invoice in full and in cleared funds. In the event of non-payment by the date falling 30 (thirty) days after the due date (including under clause 7.4 below) the Client shall pay interest on any outstanding sums at the rate of 2% (two percent) per annum above the Royal Bank of Scotland's then current base lending rate continuing until fully paid whether before or after judgement.

(a) Without prejudice to its right to terminate the Agreement as set out in clause 18, where any fees payable to Best Companies are overdue in whole or part, Best Companies reserves the right to withhold access to the Deliverables and Support Services and require that the Client return any Deliverables and suspend all Services until payment has been made in full.

- 7.3 In the event of termination of the Agreement under clause 18 all sums due under the Agreement shall be payable immediately rather than as set out above. Where an invoice has already been rendered for outstanding sums on termination it becomes payable immediately. Where an invoice for charges due has not yet been rendered, Best Companies shall be entitled to render an invoice for immediate payment.
- 7.4 Best Companies reserves the right to restrict or suspend all or part of the Services where any

undisputed charges due under this Agreement remain unpaid after the due date, and/ or until such time as payment is received in full.

- 7.5 All amounts and fees stated or referred to in this Agreement are non-cancellable and non-refundable and shall be paid without set-off or counterclaim.
- 7.6 Best Companies shall be entitled to increase the Subscription Fee, at the start of each Renewal Period, pricing is displayed within the Client dashboard and can be provided on request.
- 7.7 Fair usage rules apply when Best Companies agrees in writing to a pre-defined payment schedule. If employee headcount changes, pricing may be adjusted with prior notice before invoicing.
- 7.8 Any Preferential Rate accepted by the Client, is subject to Best Companies' invoice being paid within 7 days of the date of invoice. Otherwise, Preferential Rate shall not apply, and the Client will be subsequently charged, and will pay, the full amount of invoice in accordance with clause 7.2, unless otherwise agreed in writing.

## **8. PUBLIC SECTOR SUPREMACY CLAUSE (G-CLOUD VERSION)**

- 8.1 Where the Client is a UK Public Sector Body procuring the Services under a Crown Commercial Service framework (including G-Cloud), the CCS Framework and Call-Off Terms shall take precedence over Clause 7.
- 8.2 Accordingly:
  - a) Best Companies shall not suspend, restrict, or withdraw the Services for late payment.
  - b) All refund obligations under the CCS General Terms shall apply, notwithstanding clauses 7.2–7.5.
  - c) Pricing during the Call-Off Term shall remain fixed unless otherwise permitted by the CCS framework.
  - d) No Preferential Rate or early-payment requirement shall override statutory or CCS-mandated payment terms.
  - e) Any clause in this Agreement that conflicts with CCS requirements shall be interpreted to the minimum extent necessary to comply with those requirements.

## **9. RATING**

- 9.1 For the avoidance of doubt, neither the payment of the fees nor the performance by the Client of the other terms of the Agreement guarantees any result, Accreditation or rating or that the Client will appear on any List.
- 9.2 Except as expressly and specifically provided in this Agreement:

the Client assumes sole responsibility for results and Deliverables obtained from the use of the Services and the Materials by the Client, and for conclusions drawn from such use. Best Companies shall have no liability for any damage caused by errors or omissions in any Materials provided to the Client in connection with the Services.

## **10. INTELLECTUAL PROPERTY AND OWNERSHIP RIGHTS**

- 10.1 As between the Client and Best Companies all Intellectual Property Rights and other rights including ownership and title in the Materials and Deliverables shall be and remain vested in Best Companies. By this Agreement, Best Companies grants to the Client a licence to access and use the Deliverables on a non-exclusive, worldwide basis to such extent as is required for the purposes of this Agreement and for those purposes alone.
- 10.2 The Client may share the Deliverables internally within its organisation and, where the Client is a UK Public Sector Body, within central government bodies and Crown Bodies for legitimate operational

purposes.

- a) The Client acknowledges that the Deliverables, analysis, reporting structures, scoring models, methodologies, and Materials provided by Best Companies contain commercially sensitive information and valuable intellectual property. Accordingly, the Client shall not publish, disclose, distribute or make the Deliverables or any part of them available to the public, except where required to do so by law.
- b) Where the Client receives a request for disclosure under the Freedom of Information Act 2000 ("FOIA"), the Client shall, where permitted by law, consult with Best Companies before disclosing any Deliverables and shall take into account any representations made by Best Companies regarding the application of relevant FOIA exemptions, including but not limited to sections 41 (confidential information) and 43 (commercial interests).
- c) Nothing in this clause prevents the Client from complying with its statutory obligations under FOIA, but the Parties agree to work together to minimise any disclosure of commercially sensitive or proprietary information to the extent permitted by law.

10.3 By this Agreement, Best Companies grants to the Client a licence to use the Accolade marks as awarded by Best Companies on a non-exclusive, worldwide basis to such extent as is required for the purposes of this Agreement and for those purposes alone.

- a) Marks may be displayed extensively to showcase a Client's achievements. Examples of where it can be featured (but not limited to) include websites, recruitment pages/job vacancies, signage, vehicle livery, company stationery, advertising, promotional materials, on social networking sites, public profiles, and email footers.
- b) The mark's design and colour schemes should not be altered in any way, and should not be disassembled, cut, or reproduced in its component parts. The mark should not be rotated, skewed, or distorted within a design.
- c) Use of awarded Accolade marks are subject at all times to the Best Companies Accolade Terms of Use (Available on request).

10.4 The Materials and/or their contents, (such as the Employee Survey) used by Best Companies to create the Deliverables are provided to the Client for the purposes of this Agreement alone. The Materials should not be reproduced or disclosed to third parties (save for Employees, agents, professional advisers for the purposes only of the Agreement or as required by law) save with the permission in writing of Best Companies which permission shall not be unreasonably withheld.

10.5 Each and every piece of Input Material provided by Employees or other agents of the Client, through the Employee Surveys or in any other manner for the purposes of this Agreement is confidential and remains in the ownership and independent control of Best Companies both before and after the termination of this Agreement. Best Companies will comply with its duties as Controller in respect of that data.

## 11. CONFIDENTIALITY

11.1 Subject to clause 14.17a, each party undertakes that it shall not at any time and for a period of 3 (three) years after termination or expiry of the Initial Subscription Term and where applicable, expiry or termination of a Renewal Period, disclose to any person any confidential information concerning the business, affairs, customers, clients or suppliers of the other party or of any member of the group of companies to which the other party belongs except as permitted by clause 10.2.

11.2 Each party may disclose the other party's confidential information:

- (a) to its own employees, officers, representatives, advisers, agents, contractors or subcontractors who need to know such information for the purposes of exercising the party's rights or carrying out its obligations under or ancillary to this Agreement. Each party shall ensure that its employees, officers, representatives, advisers, agents, contracts or subcontractors to whom it discloses the other party's confidential information comply with this clause 11; and
- (b) as may be required by law, a court of competent jurisdiction or any governmental or regulatory authority.

11.3 No party shall use any other party's confidential information for any purpose other than to exercise its rights and perform its obligations under or in connection with this Agreement.

## **12. WARRANTY**

12.1 Except as otherwise expressly provided, Best Companies warrants that, at the time of performance, the Services shall:

- (a) conform in all material respects to their description;
- (b) be free from material defects; and
- (c) be supplied with reasonable care and skill within the meaning of the Supply of Goods and Services Act 1982, Part II s 13.

12.2 Except for the warranties set out in clause 12.1, and except as expressly provided elsewhere in this Agreement, Best Companies does not give any other warranties in respect of the Services. All other warranties and conditions, (including the conditions implied by sections 12-16 of the Supply of Goods and Services Act 1982), whether express or implied (including those implied by statute, common law or otherwise), are excluded to the fullest extent permitted by law.

## **13. LIMITATION OF LIABILITY**

13.1 References to liability in this clause 13 include every kind of liability arising under or in connection with this Agreement including but not limited to liability in contract, tort (including negligence), misrepresentation, restitution or otherwise.

13.2 Nothing in this clause 13 shall limit the Client's payment obligations under this Agreement.

13.3 Subject to clause 13.6, each Party's total liability, including under the indemnities, shall not exceed £5 million. This limit on liability shall apply to any one claim or series of related claims.

13.4 Subject to clause 13.6, neither Party shall be liable whether in tort (including for negligence or breach of statutory duty), contract, misrepresentation, restitution or otherwise for consequential, indirect or special losses howsoever arising under this Agreement.

13.5 Subject to clause 13.6, neither Party shall not be liable whether in tort (including for negligence or breach of statutory duty), contract, misrepresentation, restitution or otherwise for any of the following (whether direct or indirect):

- (a) loss of profits;
- (b) loss of business;
- (c) loss of production;
- (d) loss of contract;
- (e) loss of opportunity;
- (f) loss of savings, discount or rebate (whether actual or anticipated); or
- (g) harm to reputation or loss of goodwill.

13.6 Nothing in these Conditions limits or excludes the liability of the Parties in respect of the following:

- (a) death or personal injury caused by negligence; or
- (b) fraud or fraudulent misrepresentation; or subsistence; or
- (c) any other losses which cannot be excluded or limited by applicable law.

#### **14. DATA PROTECTION**

14.1 Subject to clause 10.5, under this Agreement Best Companies accepts that although the Client retains overall control of supplied Personal Data contained in the Input Material, Best Companies can and will make its own decisions, determining the purposes and means as to how it uses that data in the provision of an Accolade and/or Surveys and/or Additional Services and/or research to the extent that it is an independent Controller within that process. Best Companies acting as Controller additionally processes the said data on the basis that its Processing is compatible with the original purpose of data collection. With regard to any other data Processing activities by the Client and over which Best Companies does not exercise such degree of control the Parties recognise that the Client is the Controller and Best Companies the Processor in relation thereto. Best Companies therefore recognises and accepts that it owes duties as both an independent Controller and Processor within the meaning of the Data Protection Legislation under this Agreement.

14.2 The Parties agree that they will each comply with all Data Protection Legislation in the Processing of Personal Data.

14.3 The Parties will indemnify each other and hold each other harmless from any cost, charge, damages, expense or loss, which they cause each other as a result of their breach of any of the provisions of this clause 14. Indemnification hereunder is contingent upon (a) the party(ies) to be indemnified (the "indemnified party(ies)") promptly notifying the other party(ies) (the "indemnifying party(ies)") of a claim, (b) the indemnifying party(ies) having sole control of the defence and settlement of any such claim, and (c) the indemnified party(ies) providing reasonable cooperation and assistance to the indemnifying party(ies) in defence of such claim.

14.4 In the event that Personal Data is transferred to Best Companies by the Client from the European Economic Area for the purposes of processing pursuant to this Agreement in circumstances which render that transfer restricted within the meaning of relevant Data Protection Legislation, the following shall apply in order to provide an appropriate safeguard:

- a) the Parties shall enter the Standard Contractual Clauses agreement; and
- b) the agreement referred to above will be effective upon it being signed by both Parties; and
- c) a copy of the executed agreement shall be delivered to each of the Parties.

14.5 Best Companies agrees that it will only process Personal Data on the Client's written instruction unless such processing is required by law in which case, to the extent that it is permitted by law to do so, Best Companies will inform the Client of that legal requirement before it undertakes such processing. Best Companies shall immediately inform the controller if, in its opinion, an instruction infringes Data Protection Legislation.

14.6 The Client hereby instructs Best Companies for the purposes of clause 4 above to process Personal Data as is reasonably required to comply with its obligations to provide the Services. The Client warrants and represents that it is duly authorised to give that instruction and will ensure that it has all necessary appropriate consents (where required) and notices in place to enable lawful transfer of the Personal Data to Best Companies for the duration and purposes of this Agreement.

14.7 Best Companies will ensure that persons authorised by it to process the Personal Data have committed themselves to confidentiality or are under an appropriate statutory obligation of confidentiality. Without prejudice to that condition, Best Companies shall only disclose to or allow

access to Personal Data by those of Best Companies employees (or agents or subcontractors) whose use of such data relates to their normal employment or function.

- 14.8 Taking into account the state of the art, the costs of implementation and the nature, scope, context and purposes of processing as well as the risk of varying likelihood and severity for the rights and freedoms of natural persons, Best Companies shall implement appropriate technical and organisational measures to ensure a level of security appropriate to the risk, including inter alia as appropriate:
- (a) the pseudonymisation and encryption of personal data;
  - (b) the ability to ensure the ongoing confidentiality, integrity, availability and resilience of processing systems and Services;
  - (c) the ability to restore the availability and access to personal data in a timely manner in the event of a physical or technical incident; and
  - (d) a process for regularly testing, assessing and evaluating the effectiveness of technical and organisational measures for ensuring the security of the processing;
- 14.9 Best Companies may also Process special categories of Personal Data when requested by the Client to conduct and report anonymously the findings following inclusion of a Diversity Monitoring Form. As such, that Processing is necessary for research purposes or statistical purposes under Article 9(2)(j) and in accordance with Article 89(1) of the GDPR. (In addition, where possible, Best Companies shall obtain the full and free written consent of each and every Data Subject to the Processing of relevant special categories of Personal Data by Best Companies for the purposes of the Diversity Monitoring Form). Best Companies shall comply with all other requirements of Data Protection Legislation and good practice in relation thereto.
- 14.10 Best Companies will keep a proper record of the Personal Data it is Processing pursuant to this Agreement.
- 14.11 The Client hereby provides Best Companies with a general written authority (subject to the terms set out below) to engage another Processor whether by addition or replacement. In the event that Best Companies intends to use this general authority it shall inform the Client in advance and in such reasonable time to enable any objections to be made. The sub-processor list is made available to the Client at the following online location: <https://knowledge.b.co.uk/who-are-best-companies-data-processors-or-your-sub-processors> or can be provided on request.
- 14.12 Where Best Companies engages another Processor for carrying out Processing activities on behalf of the Client, the same data protection obligations as set out in this Agreement shall be imposed on that other Processor by way of a contract or other binding legal means, in particular providing sufficient guarantees to implement appropriate technical and organisational measures in such a manner that the Processing will meet the requirements of Data Protection Legislation. Before the commencement of any sub-processing Best Companies shall make sufficient enquiries to ensure that the sub processor is capable of carrying out its data processing obligations.
- 14.13 The Parties will assist each other by appropriate technical and organisational measures, insofar as this is possible, in the fulfilment of requests for exercising Data Subject's rights. Each party shall notify the other as soon as is reasonably practicable if it receives a request pursuant to Data Protection Legislation from a Data Subject.
- 14.14 Each party will notify the other as soon as is reasonably possible on becoming aware of a Personal Data Breach affecting the other party's Personal Data and providing sufficient information and assistance to meet any and all consequential obligations under Data Protection Legislation.
- 14.15 Each party will co-operate with the other as reasonably required to assist in complying with Articles 35 and 36 of the GDPR or any equivalent or similar provision in any Data Protection Legislation.

- 14.16 Best Companies, in its capacity as a Processor will, at the choice of the Client, delete or return all the Personal Data to the Client as Controller after the end of the retention period, and delete existing copies as per the provisions of clause 14.20, unless Union or Member State law requires storage of the Personal Data. For the avoidance of doubt, Best Companies will continue to keep within its control the Personal Data it holds in its capacity as a Controller and comply with Data Protection Legislation in respect thereto.
- 14.17 Best Companies will make available to the Client on request all information necessary to demonstrate compliance with this clause of the Agreement and shall allow for, contribute to and co-operate with reasonable audits (including inspections) by the Client to ensure they are both meeting their Article 28 obligations. The Client shall give to Best Companies reasonable notice of any audit and/or inspection.
- (a) On request, Best Companies shall provide the Client (or auditors mandated by the Client) with a copy of the third-party certifications and audits to the extent made generally available to Best Companies customers. Such information shall be confidential to Best Companies and the Client shall maintain the confidentiality of such information, including but not limited to technical diagrams and information relating to Best Companies systems, security operations, vulnerability and penetration test reports and architecture for a period of ten years after termination or expiry of this Agreement and shall not without Best Companies prior written consent, disclose, copy or modify the information (or permit others to do so) other than as necessary for the performance of the Client's express rights and obligations under this Agreement.
- 14.18 Nothing in this clause entitles either party to process Personal Data in a manner, which is prohibited in the other sections of the Agreement.
- 14.19 If, as a result of any change in Data Protection Legislation, Best Companies is required to vary the terms of this Agreement it shall notify the Client in writing of the terms of the variation which shall be the minimum required to comply with the change in law. The variation shall become effective 30 days after the notification is served on the Client in accordance with this Agreement unless, within that 30-day period, the Client serves notice in writing of an objection to Best Companies. The Parties shall then use their best endeavours to resolve any differences and, in default of agreement, as per the provisions of clause 28.3 of this Agreement.
- 14.20 Personal Data will be protected by Best Companies in accordance with this clause 14 until the earlier of the following: a) a request in writing from the Client that the Personal Data is removed from the Best Companies systems by anonymisation to the extent that it can no longer be defined as Personal Data under Data Protection Legislation; or b) 3 (three) year's Subscription lapse following termination or expiry of the Subscription Term, where Personal Data will be automatically removed from the Best Companies systems by anonymisation to the extent that it can no longer be defined as Personal Data under Data Protection Legislation.

For the avoidance of doubt, Best Companies shall still be entitled to use and process the anonymised data for research purposes as statistical data.

## **15. USE OF CLIENT'S NAME**

- 15.1 Should the Client appear on any List, gain Best Companies Accreditation or Ones to Watch status the Client hereby consents to the use by Best Companies of the Client's name, on its website, social media channels including (without limitation) LinkedIn, Facebook, X (formerly known as Twitter), Instagram and other publicity, including interviews, case studies, Workshops and conference discussions, provided that such publicity accurately describes the relationship between the Client and Best Companies.
- 15.2 Client is responsible for any Employee nominated or offered to participate ("Attendee") in a Best Companies Workshop, where provided a platform, they are not to bring Best Companies, or any other organisation involved with the Workshop into disrepute.

- (a) Any discussion, comments, suggestions, or improvements offered as an Attendee relating to the Workshop or its development and exploitation are offered freely for Best Companies to use, without any expectation of compensation or participation in proceeds.

## **16. ANONYMITY**

16.1 Without prejudice to its duties under Data Protection Law in order to ascertain full, candid and honest opinions from Employees responding to the Survey, Employees' individual responses, views and opinions will be retained by Best Companies and will not be disclosed to the Client or to any other person at any time, save for where any questions are clearly marked on the Employee Survey as providing the respondent with an opportunity to give direct and anonymous feedback to their employer; cases of emergency; and/or where ordered by a court of competent jurisdiction. The responses to such questions may be disclosed to their employer without personal identifiers and attached only to information on which employment group the Employee belonged. Best Companies will, at all times observe the following rules:

- (a) Employees will never be asked to provide their names on Surveys;
- (b) to protect the identity of individual Employees to ensure anonymity, individual responses are not reported; only averages from groups where a minimum number of Employees have responded:
  - i) 3 (three) minimum responses for people leadership index;
  - ii) 5 (five) minimum responses for workplace engagement;
- (c) Any view of direct Employee comment which may be provided, will only be attributed to an employment group and not to individual Employees;
- (d) e-mail addresses and / or contact details for Survey distribution and fields required for Client restructuring purposes are not disclosed to any other Parties and are removed from our systems as per the provisions of clause 14.20.
- (e) Where dynamic demographic reporting is available, information based on demographic splits which contain the responses of fewer than five Employees, will not be reported upon to avoid identification by obvious inference;
- (f) Surveys will only be accepted that are completed online or individually sealed in their own envelope. Any Surveys received that are not separately sealed in this way will not be counted; and
- (g) Deliverables may be limited for organisations surveying with under 50 (fifty) employees, where we are unable to apply our anonymity rules to protect the anonymity of the respondents.

## **17. WORKSHOPS**

17.1 Best Companies will select and provide a suitable venue and location, when providing Additional Services. This may on Client request, include a Clients office space where it has been prior confirmed as suitable at Best Companies sole discretion.

17.2 Where the Client and its Employees are the sole recipient of the Workshop, then and then only may a Client reasonably object to the selected venue in writing to Best Companies by:

- a) Giving notice of objection, within five (5) Business Days of Best Companies confirming the venue; and
- b) must describe the Clients legitimate reason for the objection.

17.2.1 Where a Client meets the objection criteria per clause 17.2, Best Companies shall have the right to address the objection through one of the following actions (to be selected at Best Companies' sole discretion):

- (a) Best Companies will not use the venue and will make alternative arrangements where possible for the Workshop;
- (b) Best Companies will take the corrective steps requested by the Client noted in its objection (which steps will be deemed to resolve the Client's objection) and proceed to use the venue for the Workshop; or
- (c) Best Companies may cease to provide the Additional Services to the Client

17.3 On acceptance of a reasonable objection of the venue, Best Companies will liaise with the Client to re-arrange the Workshop at an alternative location. If this is not possible, Best Companies reserves the right to terminate the Workshop or the Client may decline the Services of the Workshop, whereby the Client may be invoiced for reasonable expenses accrued.

17.4 Where location is hosted externally, the Client agrees to abide by the policies as set by the venue. This includes but not limited to matters of Health and Safety including emergency procedures.

17.5 At any Workshop, Best Companies is not responsible for the property of the Client or its Employees. All personal possessions, goods or vehicles are left at the risk of the Client or Employee; this extends to onsite car parking and cloakrooms, which may be provided by the venue for the convenience of the Client. Best Companies shall only be responsible for any loss or damage to such items arising as a result of the negligence of Best Companies.

17.6 The Client shall be responsible for any damage to the venue and/or function room or any furniture, furnishings, décor or equipment therein by the wilful act or fault of its Employees.

(a) In addition, the Client shall be responsible for any additional losses suffered by Best Companies as a result of such damage for example, cancellation or refunds given of other bookings. The Client shall pay Best Companies in full on receipt of invoice, of the amount required to make good or remedy any such damage.

## 18. TERMINATION

18.1 Without prejudice to any other rights or remedies which the Parties may have, and subject to clause 3.1, either party may terminate this Agreement immediately on giving written notice to the other if:

(a) the other party fails to pay any amount due under this Agreement on the due date for payment and remains in default for not less than seven days after being notified in writing to make such payment; or

(b) the other party commits a material breach of any of the terms of this Agreement (to include the Rules of Engagement where applicable) and fails to remedy that breach (if it is remediable) within 30 days of being notified in writing of the breach; or

(c) the other party repeatedly breaches any of the terms of the agreement in such a manner as to reasonably justify the opinion that its conduct is inconsistent with it having the intention or ability to comply with the terms of the Agreement; or

(d) the other party suspends, or threatens to suspend payment of its debts or is unable to pay its debts or (being a company) is deemed unable to pay its debts within the meaning of Section 123 of the Insolvency Act 1986 or, being a natural person, is deemed either to be unable to pay its debts or having no reasonable prospect of doing so within the meaning of Section 268 of the

Insolvency Act 1986 or, being a partnership, has a partner to whom any of the foregoing apply; or

(e) the other party commences negotiations with all or any class of its creditors with a view to rescheduling any of its debts, or makes a proposal for or enters into any compromise or arrangement with its creditors; or

(f) a petition is filed, a notice given, a resolution is passed, or an order is made for or in connection with the winding or bankruptcy of that other party; or

(g) an application is made to a court, or an application or an order is made for the appointment of an administrator or notice of intention to appoint an administrator is given or if an administrator is appointed over the other party; or

(h) a floating charge holder over the assets of that other party has become entitled to appoint or has appointed an administrative receiver; or

(i) a person becomes entitled to appoint a receiver over the assets of the other party or a receiver is appointed over the assets of the other party; or

(j) a creditor or encumbrancer of the other party attaches or takes possession of, or a distress, execution, sequestration or other such process is levied or enforced on or sued against, the whole or any part of its assets and such attachment or process is not discharged within ten (10) Business Days: or

(k) any event occurs, or proceedings is taken, with respect to the other party in any jurisdiction to which it is subject which has an effect the same as or similar to any of the matters set out in this clause 18; or

(l) the other party suspends or ceases or threatens to suspend or cease to carry on all or a substantial part of its business.

(m) The accrued rights and liabilities of the Parties at termination shall not be affected by such termination.

18.2 Any clause which expressly or by implication continues after termination shall not be affected by such termination.

18.3 Should notice to terminate this Agreement be served by either Party or the Client give written notice to withdraw its application to appear in a List, if such written notice is received:

18.3.1 less than 6 weeks prior to the publication of a List, this may not allow Best Companies sufficient time to reasonably request the removal of the Client from a List (where this aspect of the Services has been contracted for); or

18.3.2 Best Companies has already taken steps to arrange for publication of an Accolade, then the Client will, notwithstanding serving of such notice, appear in a publication, where eligible.

## 19. COMPLIANCE WITH THE RULES

19.1 Without prejudice to the right to terminate, in the event that the Client is in breach of the Rules of Engagement where they are applicable, Best Companies shall be under no obligation to provide the Services or be under any liability to refund any sums received by Best Companies.

## 20. FORCE MAJEURE

- 20.1 Best Companies will have no liability to the Client under this Agreement if it is prevented from, or delayed in performing, its obligations or from carrying on its business by acts, events, omissions or accidents beyond its reasonable control including strikes, lock-outs or other industrial disputes (whether involving the workforce of Best Companies or any other party) failure of a utility service or transport network, act of God, war, riot, civil commotion, malicious damage, compliance with any regulation, law or court order, breakdown of plant or machinery, fire, flood, storm, pandemic, epidemic or default of suppliers or subcontractors.

## **21. VARIATION**

- 21.1 If by providing the Survey, Accolade and/or Additional Services as defined above, Best Companies would be rendered in breach of any statutory requirement, Best Companies may vary the nature of the Services to the reasonable minimum extent to avoid any such breach and provided that such variation does not materially affect the level of charges payable as a result.
- 21.2 Without prejudice to the provisions of clause 14.19 above, there shall be no variation of the terms of this Agreement other than as agreed in writing and signed by both Parties.

## **22. WAIVER**

- 22.1 Any waiver of rights under this Agreement is only effective if it is in writing and it applies only to the circumstances in which it was given. No failure (in whole or in part) or delay by a party in exercising any right or remedy under the Agreement or in law shall constitute a waiver of that (or any other) right or remedy or its exercise in the future.
- 22.2 Unless specifically provided otherwise rights arising under this Agreement are cumulative.

## **23. SEVERANCE**

- 23.1 If any provision of this Agreement (or any part provision) is found by any court or other authority of competent jurisdiction to be invalid, illegal or unenforceable that provision (or part) shall apply with the minimum modification necessary to render it legal, valid and enforceable. Alternatively, that provision (or part) to the extent required, shall be deemed not to form part of the Agreement, the remainder of which shall not be affected.
- 23.2 Unless specifically provided otherwise rights arising under this Agreement are cumulative.

## **24. ENTIRE AGREEMENT**

- 24.1 This Agreement constitute the whole agreement between the Parties and supersedes all previous agreements between the Parties relating to the same subject matter.
- 24.2 Each party acknowledges that in entering into this Agreement it has not relied on any statement, representation, assurance or warranty other than as provided in the Agreement.

## **25. ASSIGNMENT**

- 25.1 Neither party is entitled to assign this agreement in whole or in part without the prior written agreement of the other party.
- 25.2 Where the Client is a UK Public Sector Body procuring the Services under a Crown Commercial Service framework (including G-Cloud), the Client may assign or novate this Agreement to another Crown Body or successor organisation without requiring the consent of Best Companies.
- 25.3 For the avoidance of doubt, where the Client has been awarded an Accolade, any permitted

assignment or novation shall not confer any right to transfer, amend or reinterpret the Accolade, its grade, its inclusion in any List, or any related recognition. Accolades and List placements remain fixed as awarded, based on the conditions, methodology and survey eligibility criteria applicable at the time of the original Survey.

**26. RIGHTS OF THIRD PARTIES**

- 26.1 Save as expressly provided for in this Agreement in respect of Data Subjects, no person who is not a named party to this Agreement shall have any rights under or in connection with it.
- 26.2 For the avoidance of doubt, each party warrants and represents that it is acting on its own behalf and not on behalf of any other person.

**27. NOTICES**

- 27.1 Any notice required to be given under this Agreement shall be in writing and shall be delivered personally (in which case a written signed receipt must be obtained) or sent by pre-paid first-class post, recorded delivery, by commercial courier or email to the other party or as otherwise agreed between the Parties in writing.
- 27.2 Any notice required to be given under this Agreement, if sent by email, is not effective unless and until receipt is acknowledged by Best Companies.
- 27.3 A notice served other than by email shall be deemed to have been duly received if delivered personally or by commercial courier on the date so delivered as recorded on the receipt. In the case of service by first class post recorded delivery, the notice shall be deemed to have been at 9.00 am on the second business day after posting.

**28. GOVERNING LAW AND JURISDICTION AND DISPUTE RESOLUTION**

- 28.1 This Agreement is, and any dispute arising out of it shall be, governed by the law of England and Wales.
- 28.2 The Parties agree that the courts of England and Wales shall have exclusive jurisdiction over any dispute arising out of this Agreement.
- 28.3 The parties shall use reasonable endeavours to reach a negotiated resolution of any dispute by a meeting between the Authorised Personnel and Best Companies to discuss the dispute and attempt to resolve it. The specific format for the meeting to be left to the reasonable discretion of the parties.
- 28.4 Either party may issue formal legal proceedings at any time whether or not the steps in clause 28.3 have been completed.

Duly authorised and electronically accepted on behalf of **Client**.

Signed by: **Eleanor Blore**  
Duly authorised for and on behalf of  
BEST COMPANIES LIMITED  
**(Best Companies)**

**SIGNATURE**   
**JOB TITLE:** Data Protection Officer  
**DATE** 1st April 2026

## SCHEDULE 1

### RULES OF ENGAGEMENT

The Rules of Engagement apply to any Best Companies Accolade and include the Conditions applying for evaluation for a Best Companies Accreditation and where applicable any List.

#### **Part 1 – “Accolades” Rules of Engagement**

##### **1. INTRODUCTION**

It is important that you read the Rules of Engagement carefully. These measures are in place to ensure that a fair and consistent approach is maintained throughout the process. Clients are required to abide by these Rules of Engagement.

Outlined below is a description of the rules by which Best Companies operates, and what is expected from organisations being assessed for the Accolades.

##### **PURPOSE**

Accreditation is an elite performance standard to recognise and reward organisations that demonstrate high levels of workplace engagement. Successful organisations are encouraged to celebrate and promote their achievement and create a forum for best practice. Participating organisations are measured against eight key workplace factors to identify a Best Companies Index (“BCI”) score. The BCI will determine any applicable star rating and recognise against a fixed standard where:

|              |             |
|--------------|-------------|
| One to Watch | Good        |
| 1 Star       | Very Good   |
| 2 Stars      | Outstanding |
| 3 Stars      | World Class |

Unlike a competition (where performance positions may change based on the overall number and standard of participants). Accreditation is designed to provide a consistent standard over the years.

##### **2. DEFINITIONS**

2.1 The following definitions are provided to assist understanding and should be read in conjunction with the definitions in the main agreement:

|                         |   |
|-------------------------|---|
| <b>“Accreditation”:</b> | The Best Companies Accreditation Scheme   |
| <b>“Bank Staff”:</b>    | A pool of workers that an employer can call on as and when work becomes available. The employer is not obligated to provide work for its ‘Bank Staff’ nor is any member of the pool of ‘Bank Staff’ obliged to accept it should it be offered (no ‘Mutuality of Obligation’). |
| <b>“Contractor”:</b>    | an individual or organisation who may be carrying out work commissioned by and under a contract to a client.  |

There is no employee status – the individual does not have a contract of employment.

**“External Seconded”:**

where Employees of the organisation are temporarily seconded to another organisation but retain employee status under a contract of employment with the seconding organisation and are included in payroll or “Implant” where an organisation provides staff to another organisation under contract. The Employee experiences the workplace environment of the organisation.

**“Freelancer”:**

where there is a contract for Services. There is no employee status – the individual does not have a contract of employment.

**“Full Time Equivalent”:**

a full-time employee, or a combination of part-time Employees whose combined hours are the equivalent of a full-time position. For the purposes of the process, Best Companies uses the following definitions:

Full time = 35 hours or more per week

Part time = fewer than 35 hours per week

### 3. ELIGIBILITY CRITERIA

The Client hereby confirms that on the first of the month prior to that month in which the surveying commences, it meets or will meet, by the commencement of the Survey, the following eligibility criteria and if any change occurs prior to the termination of this agreement, it will immediately inform Best Companies (including any such change that takes place before the commencement of the Survey).

- (a) The organisation must have been in existence and operating as a legal entity for a minimum of twenty-four (24) months;
- (b) The organisation has a minimum of 25 full-time (or full-time equivalent) Employees working within the organisation’s own workplace environment. An organisation may be required to provide further evidence to confirm their headcount. Employees will:
  - i) have an employment contract, and
  - ii) be aged 16 years or over.
- (c) At least 50% of Employees must have worked at the Client’s organisation for a minimum of 6 months, prior to surveying.
- (d) Organisations being evaluated for an Accolade should include:

All Employees on the payroll (for UK Accolade, include United Kingdom or Great Britain and Northern Ireland including the Isle of Man & Channel Islands but not including Employees in the Republic of Ireland or other countries);  
Employees on maternity leave;  
External Seconded / Implant into the organisation; \*  
Equity partners;  
Non-Equity Partners;  
Temporary and seasonal staff \*  
Employees on zero-hour contracts \*

**Bank Staff \***

\*Only where Employee have worked at least 30 hours in each of the preceding three months prior to the Survey launch

- (e) Organisations should exclude Contractors (and sub-Contractors), Freelancers, External Consultants, Non-Executive Directors, and for country specific List should state where indicated non-country specific Employees (e.g., for a UK Accolade, non-UK Employees, franchisees or other persons not on the organisation's payroll, should be marked as ineligible for Accreditation;
- (f) Any contemplated management buy outs or proposed mergers, de-mergers or acquisitions not completed and fully integrated prior to commencement of the Survey process and any that are anticipated to take place prior to publication of the results of the Survey eligibility will be considered on their merits and must be notified to Best Companies in writing;
- (g) Organisations involved in the processing of Surveys, or the editorial compilation related to Best Companies Accolades are ineligible.
- (h) Best Companies, may allow a Client to be evaluated for an Accolade where they do not directly employ staff, such as an External Employee or Implant but where for the individual:
  - i) it is their sole place of work;
  - ii) they would recognise the leader of the company, as their leader
  - iii) they are entitled to the same benefits as direct Employees
- (i) Acceptance to participate will be based on merit, eligibility requirements will be considered on a case-by-case basis. Best Companies' decision on acceptance for inclusion is final.

**4. GROUPS AND TRADING DIVISIONS**

If an organisation is comprised of multiple trading divisions, it may enter in one of two ways:

**4.1 As a Group of Companies or Divisions**

Under this scenario, all UK trading divisions must be included in the Survey process. The sample of Employees surveyed must include Employees from all UK companies or divisions and any data provided in the overall submission must reflect the organisation as a whole. In cases where the parent organisation does not wholly own a subsidiary but owns 50% or more (i.e., is the majority shareholder) then these subsidiaries must also be included as part of the group.

**4.2 As Individual Trading Divisions**

Each trading organisation, division or subsidiary entered must operate as a separate legal entity from any other organisation or division in the organisation complete with its own board of directors, managing director or CEO, and its own separate policies and procedures relating to its personnel. Although a rare occurrence, where an individual trading division does not have a separate company registration number, an application to enter may still be accepted, provided Best Companies are satisfied that the divisions are sufficiently separate and an entry in this manner is appropriate.

**5. MERGERS AND ACQUISITIONS**

Any merger, de-mergers, acquisitions or management buy-outs or the like completed or ongoing during the twelve months prior to the commencement of surveying and any that are completed

or ongoing after commencement of surveying and prior to publication of the results may affect eligibility and will be reviewed case by case at the discretion of Best Companies.

## **6. OTHER COMPANY CHANGES**

Best Companies acknowledges that from time-to-time businesses may undergo major changes i.e., large-scale restructuring exercises, downsizing, changes in trading name, etc., with little advance notice. To help ensure research data collected from your organisation remains current, up to date and is reflective of the present environment found in your workplace, Best Companies must be notified of any significant changes in the structure or operation of a business that takes place after the commencement of surveying and prior to publication of the results.

## **7. ENTRIES**

- 7.1 Employee Surveys and the Cultural Insight must be submitted in accordance with the process notified to the project manager for an organisation to be eligible for the award of an Accolade.
- 7.2 No communications express or implied may be made to Employees which might encourage a favourable response such as communications highlighting employment benefits whilst introducing or reminding Employees about the Survey.
- 7.3 Any communications made to Employees during the three months prior to the Client's agreement to these Rules of Engagement and Terms of Service, which may be deemed to be encouraging a positive response, by highlighting employment benefits whilst introducing or reminding Employees about this Survey must be notified in writing to Best Companies before surveying is undertaken.

## **8. ACCOLADE ENTRY**

- 8.1 When setting up a Survey the Client will be responsible for selecting to be evaluated for Accreditation and List(s). Where a Client does not want to be put forward for Accolade evaluation, they may select to Survey only. For the avoidance of doubt, Surveys must meet with the eligibility criteria for evaluation for an Accolade.
- 8.2 A Client may select in advance of a Survey Period to be evaluated for Accreditation at any point during the Accreditation Year. Evaluation will commence on completion of a qualifying Survey Period.
- 8.3 A Client may continue to promote the highest achieved Accreditation standard awarded during a Recognition Year.

## **9. PROJECT MANAGEMENT**

- 9.1 All Clients must nominate Authorised Personnel as project manager(s) from within their organisation whose responsibility will be to ensure that the entry is completed within the timelines and in adherence with these Rules of Engagement. The project manager must have access to both external email and the internet to effectively manage the process. They will also need to have access to data such as Employee names, email addresses, job grade and employment group information. In the interests of confidentiality, Best Companies will only discuss the entry process with the project manager or other nominated person or persons.
- 9.2 Clients will have visibility of the number of respondents to the Employee Survey. This information must not be used to approach individual Employees to ascertain if and/ or how they have responded. Best Companies will provide the project manager with appropriate communications for distribution to encourage increased levels of response from Employees for completing Employee Surveys. However, any additional activities from a Client (such as

targeting individual Employees or undue pressure being exerted on Employees) may lead to disqualification.

- 9.3 Best Companies will conduct independent checks on organisations and investigate any concerns raised as part of our Accolade evaluation process. This includes but not limited to information received from whistle blowers. Where a Client has been reported or is considered in violation of the Rules of Engagement, a Client project manager may be contacted for additional information, to give a warning, or to make immediate corrective action. In serious cases of violation, Clients will be advised that Services will be terminated, and entry withdrawn from Accolade evaluation. This action is to protect the integrity of a Best Companies Accolade and any decision made by Best Companies in these matters is final.

## 10. BEST COMPANIES EMPLOYEE SURVEY

- 10.1 To elicit and measure the views and opinions of the Employees and to provide a fair measure for Accolade evaluation, all Employees must have the opportunity to Survey. Employees may be marked not for survey in specific circumstances where they do not meet our eligibility requirements, such as the leader of the organisation, eligibility guidance will be provided on request.
- 10.2 At Best Companies' sole discretion under specific circumstances, it may be allowed for a selection of Employees to be invited by Best Companies to complete an Employee Survey ("Sample"). The minimum number of Surveys that an organisation will receive is dependent on the size of organisation as determined by Best Companies.
- 10.3 At the sole discretion of Best Companies, surveys may be reset on request and/or some organisations may be required to distribute an additional number of surveys.

## 11. SURVEY METHOD

- 11.1 Best Companies may provide access to the Employee Survey through one or more secure distribution methods, as appropriate for the organisation and its workforce. Each Employee will receive the information required to complete their Survey individually and confidentially. It is essential that Survey materials are delivered only to the intended Employee. Failure of correct delivery may affect the accuracy of demographic reporting and the validity of the Survey process.

## 12. REQUIRED RESPONSE RATE

- 12.1 A minimum of 20 (twenty) validly completed surveys must be submitted for an organisation to be considered for an Accolade. In addition, the following response rates will need to be achieved. For more information please view: <https://knowledge.b.co.uk/what-is-the-minimum-response-rate-that-our-organisation-needs-to-achieve>

| Organisation Size  | Required Returns                         |
|--------------------|--|
| 25 – 49 Employees  | 75% or 20 Surveys (whichever is greater) |
| 50 - 74 Employees  | 60% or 20 Surveys (whichever is greater) |
| 75 - 249 Employees | 50% or 20 Surveys (whichever is greater) |
| 250+ Employees     | 40% or 20 Surveys (whichever is greater) |

- 12.1.1 Where an organisation's Employees return fewer than the number, or proportion, of surveys required the Client will not be evaluated for an Accolade.
- 12.2 Should you be concerned about the level of response to your Survey or require any help or advice on achieving a higher response rate, please contact Best Companies for advice.

Should a Client fail to achieve the required response rate by the end of the period designated by Best Companies for the Survey process then it will be excluded from assessment for a Best Companies Accolade.

- 12.3 The Client shall not, under any circumstances, pressure, coerce, instruct, incentivise, or target any Employee individually to compel completion of the Employee Survey or to obtain disclosure of how an Employee has responded. The Client shall not seek to identify individual responses, shall not request or require Employees to confirm whether they have completed the Survey, and shall not take, threaten, or imply any form of adverse action or consequence related to an Employee's choice to participate, not participate, or the nature of their responses. Any conduct by the Client or its representatives that may compromise the anonymity, independence, or integrity of the Employee Survey process shall be deemed a material breach of this Agreement.

### **13. BEST COMPANIES CULTURAL INSIGHT**

- 13.1 In addition to the Employee Survey the Client shall be required to complete a "Cultural Insight". The Cultural Insight supports the evaluation of an organisation to be shortlisted for a special award and provides detail to assist composition of your company profile, editorial content, to help Best Companies publicise your organisation and create your organisation profile. This content may be used to highlight areas of best practice and may be used on Best Companies websites and within related publications. Where an organisation is being evaluated for an Accolade the Cultural Insight requests information on various aspects including:

- (a) a detailed breakdown of Employee numbers;
- (b) Client information relating to
  - i) the factors of workplace engagement; and
  - ii) basic details of Client's organisational purpose and financial information.

- 13.2 Failure to complete and submit the Cultural Insight by the final deadline, may render an organisation ineligible for an Accolade.
- 13.3 Best Companies will review the sector List a Client has requested to be evaluated against. Organisations may be entered in an alternative sector List, should in Best Companies opinion it is better suited. Previous listing in an alternative List will not take precedent over that decision. Best Companies decision in this matter is final.

### **14. WORKPLACE VISITS**

Best Companies may require to visit a Client's premises in the later stages of the research when scores from the Employee Survey have been determined and the Cultural Insight has been reviewed. Clients that are shortlisted for visits by Best Companies will be notified in advance and hereby agree to facilitate any such visit by Best Companies to their premises during a Business Day.

### **15. MEASURING PERFORMANCE**

- 15.1 The Best Companies Index (BCI) scores and where applicable, positions on Lists are based on objective data that Best Companies obtains from the measurement process. The intention is not to judge by what we believe is best but to produce an accurate measure by what Employees tell us. Clients will be assessed on eight key workplace factors by measuring Employee responses to the Employee Survey.
- 15.2 Best Companies' methodology details the process and measurement of performance. A detailed description of our methodology is available upon request and for the avoidance of

doubt in agreeing to these terms the Client agrees and accepts this methodology and scoring.

## **16. SUPPORT SERVICES**

16.1 Use of the telephone/email support and access to Survey results is limited to the Authorised Personnel.

## **17. WITHDRAWALS / DISQUALIFICATION**

17.1 Withdrawals

Should an organisation wish to withdraw they must do so in accordance with clause 17. Written withdrawal request must be submitted to Best Companies as early as possible prior to publication. Once publications have been finalised, removing an organisation may not be possible.

17.2 Data Integrity and Disqualifications

- (a) For the protection and benefit of all participant organisations, Best Companies actively monitors survey submissions to identify survey responses and response patterns which may be erroneous, fraudulent, illogical, or statistically improbable. Where found, such responses will be removed and may prompt further investigation, which could lead to an organisation being disqualified.
- (b) Best Companies reserves the right to disqualify participant organisations from an Accolades at its' sole discretion. Grounds for disqualification may include an event or action that takes place within an organisation which in the reasonable opinion of Best Companies may affect their credibility as a good employer, the mishandling of Materials, such as the Employee Survey, submission of illogical, statistically improbable, erroneous or invalid data, dishonesty or the failure to abide by the rules, terms, Conditions or spirit of the project. In such circumstances, Best Companies reserves the right to retain all Subscription Fees.
- (c) Clients should be aware that Best Companies actively requests Employees of participating organisations to contact Best Companies if they have any concerns about the way the Employee Survey process has been conducted. Concerns are treated confidentially and will be investigated accordingly.
- (d) Best Companies may refuse to evaluate an organisation for an Accolade, and it may also remove an Accolade status from a Client where in Best Companies reasonable opinion:
  - (i), the Client conducts itself in such a manner warranting removal; or
  - (ii) the Client receives negative or adverse publicity.

- that may cause a negative impact to Best Companies, damage Best Companies' reputation or cause harm to the prestige of the Accolade the Client has been awarded. In such circumstances the Client shall immediately cease all use of Best Companies' Accolade marks.

## **18. PUBLICATION**

18.1 Decisions in relation to scoring and status made by Best Companies are final and no correspondence will be entered into. Clients will be notified as soon as reasonably practicable in accordance with timescales set by Best Companies, of having achieved an Accolade along with their BCI score and Accreditation grade.

18.2 Best Companies may, be required to discuss the Client and its operations directly with an Employee or Employees of the Client. In the event that within those discussions an Employee

or Employees reports criminal acts, then the Client agrees that Best Companies will report those acts to the responsible authority to the extent required by law. If within those discussions an Employee or Employees reports a failure to act within the Rules of Engagement, then, for Best Companies to successfully referee and protect the reputation of the Accolades, the Client agrees that Best Companies may take such action to address such reports as it considers reasonable.

## 19. PR

Best Companies will seek coverage to publicise successful organisations. This may include interviews with the Client organisation and their Employees whilst an organisation remains accredited. All organisations successful in gaining an Accreditation or Ones to Watch status will be publicised. Best Companies does not require the prior approval or consent to any PR it wishes to issue pursuant to this clause and it is the responsibility of the Client to obtain consent (where required) for Best Companies to include their Employee names, images and interviews.

## 20. RECOGNITION MARKS, AWARDS AND MERCHANDISE

- 20.1 Organisations awarded Accolade status can purchase awards and merchandise from Best Companies' online shop and download Accolade marks, provided they meet the relevant standards.
- 20.2 These Accolade Marks and awards may only be displayed by the organisation that have been awarded Accolade status. They must be used in a manner that accurately represents the organisation's achievements and upholds the integrity and reputation of Best Companies.
- 20.3 Upon downloading the Accolade Mark, the Client accepts the Accolade Terms of Use, which includes guidelines on how the marks may be displayed.

## 21. EVALUATION

For the avoidance of doubt, there are no additional fees for being evaluated for an Accolade. Where entitled the Client shall opt into Accolade evaluation when selecting the survey type. Clients that receive an Accreditation status, shall be automatically entered and listed in applicable Lists.

## **Part 2 – Additional Rules of Engagement Specific to the Lists**

### 22. THE PURPOSE OF THE LISTS

- 22.1 To recognise the very best organisations to work for on a national, regional and sector basis, and to provide benchmark research into workplace engagement. For Successful organisations, publication of an online profile and the ability to use the relevant Best Companies to Work For awarded mark(s).
- 22.2 Best Companies retains sole discretion over the creation, timing, format, and publication of any List. Nothing in this Agreement obliges Best Companies to publish a List in any given Recognition Year or at all. Where a List is produced, Best Companies may determine the manner, extent and timing of publication, including whether to publish individual rankings, sector Lists, regional Lists, or any related materials. Clients acknowledge that participation in a Survey or eligibility for an Accolade does not guarantee publication or inclusion in any List.

### 23. LIST SPECIFIC ELIGIBILITY CRITERIA

- 23.1 A Client will be evaluated for List entry determined on location of operations and/or organisation size and/ or sector where client has selected evaluation.
- 23.2 Certification of a Best Companies Accreditation and a minimum of 600 BCI score is a requirement to be considered for any List entry.

## **24. ENTRY DEADLINE**

- 24.1 List entry deadline will be communicated to Client on purchase of Services. No entries will be accepted after the closing date communicated to the Client.
- 24.2 Where a Client misses the deadline for a List entry, the Survey results will be considered for the next List entry.

## **25. SCORING & PLACEMENT**

- 25.1 Decisions in relation to scoring and placement made by Best Companies are final and no correspondence will be entered into with Clients. Clients that achieve Accreditation will be ranked against the relevant List based on the Client's profile and location of operations.
- 25.2 Clients notified or made aware in advance (intentionally or not) of making a List and or/of their specific ranking hereby agree not to disclose any information regarding rank until the date of publication.
- 25.3 For the avoidance of doubt, regardless of the number of Survey's a Client undertakes within the Agreement period, an organisation may only have one entry within any given List. The highest achieved BCI score will stand within the Accreditation Year.

## **26. ACCOLADE PR**

- 26.1 List results for the Recognition Year will be revealed and publicised by Best Companies. There is a strict press embargo in place until the date of publication. Best Companies may seek further coverage to publicise winners from each List. This may include interviews with organisations and their Employees whilst an organisation remains on one of the Lists. Clients hereby consent to facilitate any such public relations activity as far as is reasonably possible.
- 26.2 Best Companies may publicise organisations that achieve an Accreditation status. This may include promoting the achievement on social media, interviews with organisations and their Employees and future contact by Best Companies' whilst an organisation remains on a List for that Recognition Year.
- 26.3 Clients who Survey and have opted for evaluation will have their highest result reflected in the eligible Recognition Year.
- 26.4 Clients hereby consent to facilitate any such public relations activity as far as is reasonably possible.
- 26.5 Organisations will receive recognition as a Best Company for the Recognition Year awarded only.

## SCHEDULE 2

### DATA PROCESSING

#### 1. PURPOSE OF THE PROCESSING

Best Companies is to carry out an assessment of the current levels of workplace engagement. Data is transferred to Best Companies by the Client, for the purposes of providing the Services. Secondary processing will be conducted by Best Companies, as a separate Controller, to the extent it is considered compatible processing in accordance with the Agreement.

#### 2. DATA SUBJECTS

Subject to the Eligibility Criteria within Schedule 1, the Personal Data transferred may concern the following categories of data subjects

- Client Employees

#### 3. CATEGORIES OF DATA

The Personal Data transferred by the Client may include the following categories of data, dependent on the services requested and requirements of processing:

|  |   |  |
|--|---|--|
| First Name<br>Surname<br>Payroll/ Unique Number<br>Email Address<br>Delivery Postcode<br>Eligible for Accreditation<br>Reporting Office Postcode | Employment Group<br>Manager Name<br>Manager Payroll/ Unique Number<br>Date of Birth<br>Start Date<br>Contracted weekly hours<br>Annual salary | Registered Sex at Birth<br>% Time Spent Working Remote<br>Job role<br>Job Grade/Level<br>People manager<br>Reason for survey exclusion |
|--|---|--|

Best Companies may on occasion have a requirement to undertake Processing of “Special Category Data” (as per the meaning in Data Protection Legislation), where requested by Client for inclusion of the Diversity Monitoring Form in order to consider the needs of all individuals in their day-to-day work – in shaping policy, in delivering services, and in relation to their own Employees.

Special category data processed may include but not limited to:

|  |
|--|
| Racial and ethnic origin<br>Religious and philosophical beliefs<br>Health and disability<br>Sexual orientation |
|--|

#### 4. RETENTION PERIODS

Best Companies shall retain the Personal Data for the following periods, unless otherwise agreed in writing by both Parties. For the avoidance of doubt Personal Data will not be retained in excess of 3 (three) years following termination or expiry of Subscription Term as per the provisions of clause 14.20.

| Category of Data   | Agreed retention period   |
|--|---|
| Full Name<br>Email Address<br>Payroll Number<br>Survey Delivery Location<br>Location of Work | As per clause 16.1(d) Best Companies shall retain the minimum amount of Personal Data to protect the invested interests of the Client. The Client will notify Best Companies if retention is no longer required, and to commence the anonymisation process prior to this determined schedule. |
| Date of Birth<br>Employment Start Date   | Data Converted<br>Date of Birth entry converted to year (YYYY) with individual entry deleted.<br>Employment Start date converted to Month and Year (MM/YYYY)  |
| Statistical Data   | Indefinitely.<br>The Input Material following the anonymisation process, is no longer considered Personal Data.   |

## 5. RESEARCH

Best Companies as Data Controller will process the Survey data collected for research related purposes with the goal of discovering new information, informing conclusions, and supporting decision-making into better understanding engagement within the workplace.

The UK General Data Protection Regulation and the Data Protection Act 2018 contain provisions for processing personal data for research purposes.

Best Companies when conducting it's independent research will do so in consideration of the below provisions:

- archiving purposes in the public interest;
- scientific or historical research purposes;
- statistical purposes.

To use the research provisions, Best Companies shall ensure safeguards are in place to protect the rights and freedoms of individuals, using appropriate technical and organisational measures.