



best companies™

**Rules of Engagement
(Accolade Evaluation)**

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Version 1.7

For a **better workplace™**

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 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

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:

“Accreditation”: The Best Companies Accreditation Scheme

“Bank Staff”: 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’).

| | |
|--------------------------------|--|
| “Contractor”: | 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: <div style="margin-left: 40px;">Full time = 35 hours or more per week</div> <div style="margin-left: 40px;">Part time = fewer than 35 hours per week</div> |

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.