

Corporate Social Responsibility Policy

Published:
4th July 2022



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Who Serve Legal are

Serve Legal are market leaders in operational compliance auditing; supporting the UK & Ireland's online and high street retailers, as well as leisure and hospitality operators to trade responsibly and improve key compliance standards. We independently audit staff performance around age verification for age-restricted goods and customer experience for people with food allergies. Our nationwide auditor community provide detailed, real-time feedback on their experiences and we have delivered more than 1.5m compliance audits in the last 10 years, with over 40m data points analysed and shared with clients. We are a major employer of young people and we take this responsibility very seriously; ensuring the work we offer to our community supports the development of both our clients and the auditors themselves.

Serve Legal's Mission Statement

Empowering businesses to operate with confidence. Engaging, developing and mobilising young people; providing them with the opportunity to deliver high quality, accurate work.

Serve Legal's Core Values



Introduction to Corporate Social Responsibility (CSR)

At Serve Legal, we are committed to ensuring that all business undertakings are conducted as ethically as possible. We aim to consider our impact on the environment, our people and our wider community in everything we do. As a rapidly growing SME, we believe in going beyond minimum legal requirements; aiming to exceed these in our contributions to people and our planet. We demonstrate our commitment to corporate and social responsibility by adhering to, and constantly striving to improve upon, the following policies:

Environmental Responsibility and Sustainability

Serve Legal is committed to operating responsibly and sustainably in terms of our impact on the environment. Looking after our planet is hugely important to our teams, our clients and our community, and we recognise the power we have to drive real, positive change due to our network of thousands of auditors and nationwide reach. We actively encourage and incentivise greener choices throughout our business and, where we cannot reduce our environmental output, we invest in programmes to offset the emissions we create. The following section covers the key ways we're working to reduce our environmental footprint and improve the sustainability of our operations.

Reducing CO2 emissions

Current auditor travel emissions

All Serve Legal auditors are required to input the number of miles travelled to complete each of their audits, as well as the mode of transport used. This information allows us to accurately track the carbon footprint of our auditor operations and to monitor progress in encouraging greener travel methods.

Across the six-month period of October 2021 – March 2022, our auditor community reported 372,814 miles travelled by car to complete almost 100,000 audits. Based on the average age and common car models used by our auditors, we estimate an average of 221.4g of CO₂ produced per mile. Therefore, the CO₂ emissions produced by our auditor travel during this period was roughly 82.5 tonnes; equivalent to the emissions used to heat UK homes for a year.

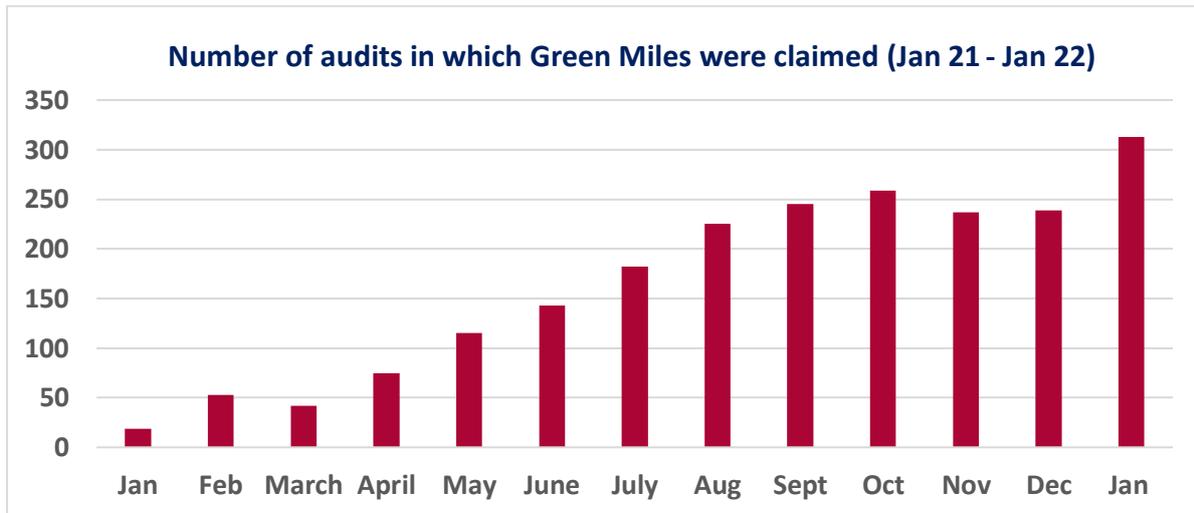
The following sections detail the ways in which we're reducing these emissions to make Serve Legal's operations more sustainable.

Green Mileage Scheme

We currently encourage our auditors to use green methods of transport by promoting our Green Mileage Scheme. We offer 10p per mile to auditors who travel by foot, bike, scooter, or any other carbon free mode of transport.

Until recently, we did not have a clear way to measure the success of our Green Mileage Scheme as our system was not built with a function to record mileage that is not related to driving. However, we have now completed a system development project which will create space for auditors to record their Green Miles and provide us with an easier and more accurate measurement. We hope this development will also increase uptake of the scheme and further encourage auditors to adopt carbon free transport methods.

We have however, used the information we currently collect to give us an idea of our starting point and the direction of travel in terms of uptake amongst our community. This data suggests that the ratio between carbon-producing and carbon-free mileage is on an upwards trend in favour of greener modes of transportation. As demonstrated by the following graph:



We continue to promote our Green Mileage Scheme through our various auditor communication channels, including our monthly auditor newsletter, social media, initial briefing information and word of mouth.

Commuting to the office

All of our office staff currently commute using green or public transport methods; train, tube and cycling. When selecting the Serve Legal office location, a high priority was placed on proximity to convenient train and tube stations as well as ensuring the availability of a safe and secure place to store cycles, in order to facilitate greener (and cheaper) travel choices. Serve Legal is also registered with the Cycle to Work scheme to enable office-based staff to access more affordable cycles and encourage greener commuting.

With a large proportion of our team working remotely across the UK, Serve Legal actively encourages travel by train, rather than higher-carbon car and plane transport, when quarterly office-based meetings and events require full-team attendance. Following the COVID-19 pandemic, we also took the decision to reduce monthly in-person Area Manager meetings to a bi-monthly frequency, with alternate meetings now held virtually. This change was implemented to encourage a healthier working-life-balance for our team as well as reducing our carbon footprint.

System investment for more efficient audit batching

As part of our on-going investment in developing the Serve Legal system, we are exploring how to increase the efficiency of audit batching to ensure that auditors are always given the most time and travel efficient set of audits to complete. Our development plans for automated audit assigning will create efficiencies and reduce the total mileage of audit batches as our system would be able to find the most efficient routes; more effective than a human creating batches by manually viewing a map.

In addition, as part of our plans to develop automated audit scheduling technology, we are exploring using a rules engine that would enable us to input all client audit programmes and account for their various rules and intricacies. This will allow us to view audits globally, rather than on the present client

by client and area by area basis and will enable us to generate further efficiencies in audit batching, thus reducing the mileage required between batches as much as possible.

Green Auditor Awards

Serve Legal award a monthly £10 bonus to the 'Green Auditor of the Month' which recognises an auditor who has gone above and beyond whilst using carbon-neutral/low-carbon modes of transport (e.g. cycle, public transport, skateboard), selected from Area Manager nominations. 'Green Auditor of the Year' awards are also presented as part of our annual Auditor Awards. In 2021, three awards of £50 each were awarded, with the winners being a public transport user, a cyclist, and a skateboard user, to showcase the range of low and zero-carbon modes of transport available to auditors. The aim of this awards scheme is to recognise the additional effort that these individuals demonstrate to reduce their carbon footprint and also to inspire more auditors to do the same.

Reducing electricity use

In our office and home working environments, Serve Legal staff are regularly encouraged to reduce their individual energy consumption by unplugging electric devices once they are fully charged and switching off these devices at the end of the working day.

In our office, a minimal lighting policy is followed during the spring and summer months when sufficient natural light reduces the need for electric lights to be switched on. The use of a communal dishwasher is also encouraged to reduce the need for hot water when individually washing items.

Investing in sustainable carbon offsetting programmes

In addition to the initiatives which focus on reducing our carbon output, Serve Legal invests annually in the Gold Standard sustainable carbon offsetting scheme to offset the carbon produced by the activity of our office and remote teams. In our 2021-22 financial year, we offset 7 tonnes of CO₂ by investing in the following sustainability projects:

- ❖ Ceará Renewable Energy Project in Brazil
- ❖ Betulia Hydroelectric Project in Honduras
- ❖ Improved Cookstoves in Guinea

At present, we do not offset the estimated carbon produced by the activities of our auditors so this is a clear target for improving our sustainability policies in the future.

Reducing waste

In order to reduce our waste, all Serve Legal staff adhere to a printing ban on non-essential materials and we strongly encourage all internal and external meetings to be paperless. Our Reusable Water Bottle Scheme reduces the use of single-use plastic bottles across our teams and all office staff are strongly encouraged to avoid single-use plastics when buying packaged lunch. Where plastics are used

in our office, Serve Legal runs its own recycling provision, despite this service not being offered by the wider office building, as we believe it is important to manage our waste responsibly wherever this is possible.

The nature of our work means we regularly require our auditors to purchase age-restricted and grocery items as part of their audits. While we do not usually dictate the specific products our auditors choose, we do encourage consideration of packaging and all of our briefing documents remind auditors to help us help the planet by recycling the packaging of their purchases wherever possible.

Looking after our People and Clients

At Serve Legal, our success comes from the people we work with and the focus we place on building strong, long-lasting relationships. Our 'human-model' approach to managing our auditor community and our consultative offering to clients have helped us to build the business that Serve Legal is today. That's why we place so much importance on building a happy, healthy, safe and enjoyable working culture as well as ensuring we reward our people for the contributions they make. Our clients stay with us because they see the value in our efficient, reliable and transparent service, as well as our clear focus on quality assurance and continually driving improvement in operational compliance. In this section we cover the key ways we ensure our people and clients feel valued and looked after.

Staff and Auditors

Fair and competitive employee benefits

We strongly believe that people who feel valued and looked after by their employers become more motivated, passionate and fulfilled by their work. At Serve Legal, we understand the importance of offering meaningful support and rewards for our hard-working teams which is why we offer a generous benefits package for our core teams; significantly exceeding statutory requirements for holiday entitlement, pension contribution, sick pay and maternity and paternity pay. In addition to our competitive salaries, we offer our people a performance-based annual bonus scheme of up to 10% of salary because we recognise the value in rewarding great performance and encouraging our teams to be the best they can be.

Our auditors are a hugely important part of our business and so we feel its important they're paid fairly and efficiently for their work. That's why we are a committed National Living Wage company and all of our auditors are paid fortnightly via PAYE; setting us apart from most 'mystery shopping' companies which require their shoppers to be self-employed and manage their own tax returns.

Effective health and wellbeing provision

Serve Legal has always recognised that a well looked after workforce is key to running a successful business, but, as with many businesses, the COVID-19 pandemic taught us a lot more about the importance of looking after the mental health and wellbeing of our teams. We continually review our wellbeing policy, including consulting directly with our people to understand how we can best support them. Our current Health and Wellbeing Policy includes the following offers to ensure our teams stay happy and healthy:

- ❖ Company-wide policy against sending 'out of hours' emails to protect everyone's valuable non-working time.
- ❖ Expense allowances to improve the working environment of our many home-based employees
- ❖ Monthly company contribution and travel allowance towards staff meet-ups for our home-based employees to encourage socialising within our remote teams.

- ❖ Monthly coffee allowance for all employees to encourage a change of scenery or improved focus in the working environment.
- ❖ Reusable Water Bottle Scheme: All staff receive a free personalised metal water bottle to encourage drinking more water and reducing single-use plastics.
- ❖ One Self-development Day per year for all core team staff. Additional to Annual Leave allowance, this day is designed to allow all staff to take a day off to learn new skills, improve their mental health or support their community.
- ❖ Quarterly company socials are a key part of our calendar, allowing us to bring the team together and let our hair down!

Equal Opportunities Policy

In accordance with the Equality Act (2010), Serve Legal is committed to equal opportunities for all employees in respect of recruitment, promotion, career and personal development. Any selection for recruitment or promotion is based solely on ability, qualifications and suitability for the work as well as potential for the future. We believe that a diverse workforce with people from different backgrounds can bring fresh ideas, thinking and approaches which improve business performance, as well as reflecting a diverse customer base.

We do not tolerate direct, indirect, perceptive or associative discrimination against any person on the grounds of actual or perceived race, religion, philosophical belief, age, sex, marital status, sexual orientation, gender reassignment, pregnancy or maternity, disability or secondary issues arising from a disability.

It is the responsibility of all staff in their daily actions, decisions and behaviour to endeavour to promote these concepts, to comply with all relevant legislation and to ensure that they do not discriminate against colleagues, customers, suppliers or any other person associated with the organisation. All staff must also report any acts of discrimination, bullying and harassment that they witness to their line manager, a senior manager or HR.

Modern Slavery Policy

Modern slavery is a crime and a violation of fundamental human rights. It takes various forms including slavery, servitude, forced or compulsory labour and human trafficking; all of which involve the deprivation of a person's liberty by another in order to exploit them for personal or commercial gain.

In accordance with the Modern Slavery Act (2015), Serve Legal has a zero-tolerance approach to modern slavery and we are committed to acting ethically and with integrity in all our business dealings and relationships and to ensure modern slavery is not taking place anywhere in our own business or our supply chain.

Ensuring our suppliers are also operating responsibly

Serve Legal does not have an extensive list of suppliers as we manage most of our operations in-house. However, we do work with several companies and individuals who support us with payroll, our system development and our training and consultancy needs. In all cases, we ensure the suppliers we choose to work with are operating responsibly and adhere to our clear policies on how we treat the environment, people and society.

Championing diversity throughout the business

We're proud have a diverse range of people working in our business and our current figures show that we employ a higher proportion of 16-24 year olds and members of the LGBT+ community when compared to the overall population of the UK. To meet our commitment to ensuring equal opportunities are offered, we used an anonymous survey to build an accurate picture of the make-up of our workforce.

	Ethnicity (% non-white)	Gender (% female or non-binary)	Sexuality (% LGBT+)	People with a disability
Serve Legal	2.4%	50%	23.8%	9.5%
UK average	13%	51-52%	6.3%	20% (working age adults)

Age:

	16-24	25-34	35-44	45-54	55-64
Serve Legal	47.60%	33.30%	4.80%	7.10%	4.80%
UK average	11.7%	13.5%	13.0%	13.3%	12.6%

Sources: Office for National Statistics and UK Government

Our Senior Management Team is 50% male and 50% female, with the whole team aged under 40 years old; demonstrating how our significant focus on youth employment and championing talented young people is present across the entire business.

Looking to the future, we plan to keep our diversity statistics under frequent review and focus on improving the balance of opportunities offered.

Safeguarding auditors

Our briefing information always recommends that auditors do not consume any products purchased on Serve Legal audits. We recognise however, that this is not realistic and we're aware there is a risk we are exposing young people to age restricted products, who otherwise may not be. We therefore take seriously our responsibility to manage and educate auditors effectively about the potential risks associated with the following products and processes involved in Serve Legal audits:

- ❖ **Alcohol:** All audits are visually checked by approvers who are trained to flag any unusual behaviour, purchase of high alcohol content drinks or spending above the recommended level. Area Managers are then able to raise any concerns with their auditors.
- ❖ **Tobacco:** It is fortunate that there tends to be a low uptake in smoking among the demographic with which we work. We have added 'Smoking Kills' promotional material to our briefing information.
- ❖ **Knives/blades:** All knife/blade audits operate a returns policy. All auditors are required to return the item to the store before leaving the site. We will not entertain audit processes where this is not agreed with the client.
- ❖ **Gambling abuse:** All our gambling briefing information warns that anyone who believes they may have a problem with gambling should contact their Area Manager and should not complete any gambling audits, they are also pointed towards tools and information that may support them with this. We are clear that this will not affect us offering the auditor work. As previously mentioned, all audits are eye balled by approvers who are trained to flag any potentially problematic behaviour i.e., long amounts of time/high spends on FOBT (Fixed Odds Betting Terminal) machines and/or high spends on over the counter bets. We also conduct a quarterly review of gambling audits, which allows us to identify any purchase costs that may have been missed at approving stage or any problematic spending habits, giving our AMs an opportunity to intervene where necessary. If we suspect any potential gambling problem, we will not continue to offer this work to the auditor.
- ❖ **Tanning salons:** On all our tanning salon briefing information, the auditor is strictly told that they should not use the tanning bed and we will never agree to conduct any audits that require use of the beds.
- ❖ **Media compliance:** All auditors are advised that they must not enter any site at which they feel uncomfortable or threatened. We provide detailed briefing information to our auditors on how best to plan for and carry out these audits to ensure they are as safe as possible. During media compliance audits, we always have a member of staff on call to assist auditors out in the field. If an auditor reports an issue at any location, this is added to our incident log and depending on the circumstances, we may choose to blacklist that site from further testing.

For all audits, we also perform a quarterly review of purchase cost data to identify any unhealthy spending trends; this allows individual Area Managers to discuss any concerns with their auditors and manage the type of work they complete for us accordingly. At present, this review is conducted manually but we plan to utilise our investment in Microsoft Power BI to streamline this process and more efficiently identify when an auditor may need intervention from their Area Manager.

In general, we are increasingly pushing clients towards a 'No ID' audit process where the need to purchase any age restricted item is largely reduced. This type of audit makes up approximately 35% of our instore testing currently and is growing.

All of our audit processes are regularly assessed by an independent health and safety professional to ensure they are safe for auditors to follow.

Creating opportunities for growth and skills development

Our criteria for who can become a Serve Legal auditor is kept as minimal as possible; there are no qualifications required or experience levels necessary. We provide an opportunity for young people to gain transferable skills that can then be demonstrated throughout the next steps of their career development, whether that is with Serve Legal or not.

Given the age-restricted nature of a lot of our auditing work, we believe it is important that opportunities are created for auditors who show talent and commitment to build upon their skills. Expanding the range of non-age-restricted work is a business priority, and is being achieved through our growing allergen compliance service. Opportunities to work within our core team are strongly advertised to our auditor community and our Area Managers actively encourage their auditors to apply for these vacancies. 73% of Serve Legal's current core team started with the business as an auditor and now fulfil roles within Operations, Data & Systems, and the Client, Sales & Marketing teams. Opportunities to work across different departments is also encouraged to expand skillsets and to support young people in finding their best fit. For example, Jenni Garratt joined as a part-time Assistant Co-ordinator within the Operations team, before starting a full-time split role as an Area Manager and Client Manager which has since led to her current role as Department Manager of the Client, Sales & Marketing team.

We ensure that our roles offer a range of working patterns and style to account for people in different stages of life. For example, our Assistant Co-ordinator roles can include flexible hours across mid-week daytimes, evenings and weekends, to fit around university schedules, other jobs and personal commitments.

All of our people are encouraged to seek out opportunities for training and development, including those in part-time, flexible roles, as well as being actively invited to complete role-specific training. Additionally, leadership development training is run at least once per year for promising and talented individuals to ensure our teams are empowered to progress within the business.

Clients

Maintaining and improving customer satisfaction and retention

As a flexible SME business, taking a service led approach with clients has always been a major focus and stimulus for Serve Legal's growth. Harnessing a consultative style, we focus on developing a bespoke audit solution with every client to deliver the maximum impact to improve performance and provide high levels of satisfaction. With such an intrinsic focus on client delivery across all company functions, we provide a reliable and accurate service that not only fosters strong client relationships, but also leads to very high renewal rates over many years. We have developed a clear set of customer-focussed company and contractual KPI's that ensure our delivery, responsiveness, communication and customer engagement will always remain front of mind in our team's daily approach to work.

Our commercial team maintain high levels of client contact via regular video conferencing, calls and account meetings to offer recommendations, respond to needs/feedback and provide actionable data insight to help improve performance. All of our major clients have successfully improved their compliance performance from through our pro-active and collaborative approach. Where errors occur, we take great care to apologise and provide swift updates and solutions. Providing added value

is an important aspect of our customer care and, as a central hub to many clients, we share best practice, unique benchmarking data and intelligence from government and regulator actions. To avoid working introspectively, we run regular client satisfaction surveys which have confirmed very high levels of satisfaction but also useful feedback helping us to enhance our service.

We're very proud that 54% of our 50 highest revenue clients have been with us for over 10 years.

Ensuring the quality of our products and services

Serve Legal have a number of systems and procedures in place to ensure that our audit process, from assignment to approval, is as error-free as possible.

Each auditor is managed individually by our team of dedicated Area Managers who develop strong relationships with their auditors through regular calls and texts. If an auditor is conducting a type of audit for the first time or there has been any change in process, our Area Managers make contact to ensure that the auditor not only knows what is expected of them, but is confident in their ability to deliver to the required standard. Auditors are also provided with bespoke briefing documents for each type of audit, allowing them to read and familiarise themselves with all of the required process. It is through this 'human-model' approach to managing our auditor community that Serve Legal is able to deliver such high levels of audit completion (99.99%) and data accuracy (99.86%).

In terms of our system, our Serve Legal portal allows auditors to easily view their upcoming audits and gives them the chance to read through the questions they'll need to answer before they conduct the audit. Where possible, the potential for human error in reporting has been minimised through the implementation of bespoke receipt reader technology which extracts receipt codes without the auditor having to manually input this information.

Once an audit report is submitted by our auditors, it is sent to our Approving Team who are specially trained to review and scrutinise all types of audits. This stage in our process ensures that all reports are checked, and if necessary corrected or reset, before they reach our clients.

We track all auditor 'pass rates' in live time; this allows us to constantly ensure we're providing a fair test to our clients. Pass rates are visible to our Approving Team when approving each audit and, to ensure there are no sudden changes to our auditors' appearance, all auditors are required to update their profile photo on a monthly basis.

Quality Assurance Programme

We run a robust in-house QA programme to ensure we are providing consistently high quality data to our clients. This programme focused on four key areas:

- ❖ **Preventing errors:** We have clear processes in place to pro-actively analyse our data and understand how we can prevent future errors.
- ❖ **Investigating errors:** We're proud of our very low error rate (0.35% of all audits). However, where mistakes are identified, these errors are always followed-up with the relevant Area Manager and Auditor to ensure appropriate action is taken and the same mistake does not occur again.

- ❖ **Training Auditors:** We have detailed and highly engaging training processes in place to effectively induct our Auditors as well as to support them in continuing to develop their skills while working for us. We recognise that members of our Auditor community learn in a range of different way and so we ensure our training materials are available in written, video and interactive session formats.
- ❖ **Engaging Auditors with the business:** We promote engagement with our Auditor community through our rewards programme, social media campaigns, social events and our focus on developing skills for future employment.

Commitment to clear communication with clients

Our dedicated Client Services Team is responsible for the swift resolution of client queries resulting from completed audits. We work to respond and resolve all queries within a target timeframe of 48 hours and our clear focus is to enhance the quality, accuracy and delivery of all audits. The Client Services Team constantly seeks to improve and refine auditing processes by acting as a conduit between the different departments within the business. The team use clear KPIs to monitor overall performance to ensure targets and objectives are met.

To properly keep clients up to date with news from within Serve Legal and of ever-changing compliance laws and current trends, we provide a quarterly newsletter for their benefit.

Creating a Positive Impact on Society and our Communities

Serve Legal was founded from a desire to support retailers to operate responsibly and protect young people from the dangers of underage drinking; so helping to make our society and communities safer really is at the heart of what we do. Our services are now supporting hundreds of businesses to offer a safer, more customer-focused and lower risk service whilst Serve Legal simultaneously provides meaningful and flexible work to young people; helping them to develop their skills as they begin their working life.

Contributing to a safer society

It is estimated that 50% of children in the UK have had a taste of alcohol before they reach the age of 14 (*Rehab Guide, 2021*). This is a highly concerning figure and so Serve Legal seeks to support our clients in protecting children from the dangers of alcohol and other age restricted items.

By providing age-verification testing to almost all of the major supermarkets and convenience stores in the UK, we've facilitated a significant rise in compliance with age-verification checks for almost every client we work with. We provide our customers with assurance that their due diligence policies are being correctly followed by to ensure that age-restricted products do not get into the hands of children.

Another concerning statistic shows that, in 2021, teenage homicides in London reached an all-time high, with most cases resulting from knife crime (*Sky News, 2022*). Serve Legal works with many market-leading retailers to ensure that knives are not being sold to underage customers, again providing the assurance that all of the correct age-verification procedures are being followed and therefore keeping our communities safer.

Responding to an increased demand in the market and the tragic, yet avoidable, deaths of allergy sufferers Natasha Ednan-Laperouse and Owen Carey, we developed the Serve Legal 'Customer Experience Allergen Audit'. This audit specifically tests how well food-to-go outlets and restaurants follow their own allergen safety policies, alongside measuring the customer service provided to an allergy sufferer. Serve Legal's mission is to help businesses to be confident in serving customers who suffer from an allergy, whilst also ensuring that allergy sufferers can enjoy eating out without doubting the safety of their food.

Through the application of our age-verification and customer experience allergen auditing programmes, Serve Legal aims to create a positive impact on society by supporting business to make the UK and Ireland safer for everyone.

Sharing best practise knowledge

As part of offering a consultative, client centric service, a major focus for Serve Legal is pro-actively adding value and sharing best practice amongst clients, to help improve their knowledge and performance. By networking at key industry events, being active members of key trade bodies across different sectors, constantly horizon scanning regulatory / industry developments and being a best

practice conduit between clients, Serve Legal provide their clients with a regular flow of risk and compliance updates that boosts their responsible retail approach.

Serve Legal also provide a regular quarterly newsletter and share unique industry and competitor benchmark data as a driver for improved compliance. In addition, we interrogate each client's data to highlight key trends to identify levers that can be used to improve performance further. We take pride in hosting regular best practice workshops and sector specific forums for our clients to share ideas and best practice in person, receiving very positive feedback. Serve Legal have also invested significantly in a cutting-edge client results dashboard, enabling live access to insight and bespoke reporting to share trends and to drive performance improvement.

Commitment to meaningful youth employment

Serve Legal currently offer work to over 3,000 active auditors aged 16-25. We take our role as a significant employer of young people very seriously, as many of our auditors join us at the very start of their careers and we understand the importance of supporting our auditors to build their confidence and transferable skills. In recognition of our focus on supporting youth employment, Serve Legal was selected as a Finalist in the 2021 Growing Business Awards 'Positive Impact Award'. This nomination was based on our offering of flexible work opportunities for young people during the COVID-19 pandemic, as well as our programme of skills workshops and provision of meaningful development opportunities within the business. Serve Legal has also been a certified Youth Friendly Employer since 2019 and we regularly re-assess how we can best support the young people who join our community. Since the business started in 2006, we have provided work for over 23,000 auditors, most of whom were aged between 16-25.

Supporting charities in line with our values

As part of our commitment to helping our communities, Serve Legal has supported a variety of charities with values strongly aligned to ours. We hold annual fundraising events such as our Charity Quiz Night and have donated to organisations including Action on Addiction, the Cystic Fibrosis Trust and the Anaphylaxis Campaign.

For our 2022 – 2023 financial year, we have chosen to raise funds for the Anaphylaxis Campaign as this charity shares our mission to improve the lives of allergy sufferers, which we are focusing on achieving through our Customer Experience Allergen Audit service. In addition to our annual chosen charity, Serve Legal also makes an annual donation to a homelessness charity instead of sending out staff Christmas cards.

Measurement

We're really proud of Serve Legal's current commitments to our planet, our people and our communities. However, we know how important it is to regularly monitor and assess our progress and continually seek to improve the way we operate. In this section, we outline how we aim to implement Serve Legal's Corporate Responsibility Policy and record the achievements accomplished as a result.

Environmental responsibility and sustainability *(Responsible team)*

- ❖ Quarterly report on CO2 emissions - *Operations*
 - Assess how to incorporate core team travel emissions into CO2 emissions report
- ❖ Quarterly report on green miles claimed (vs driving miles claimed) - *Operations*
- ❖ Understand the travel methods used to get to the office – Annual staff survey – *HR*

Looking after our people and clients *(Responsible team)*

- ❖ Six-monthly report on number of safeguarding alerts/interventions - *Operations*
- ❖ Six-monthly report on staff training – to include spend, staff involved and skills covered - *HR*
- ❖ Annual report on auditor workshops engagement - *CSM*
- ❖ Annual report on staff diversity with aim to expand this to our auditor community - *HR*
- ❖ Annual report on % core team staff who are ex-auditors - *HR*
- ❖ Understand staff satisfaction on pay, benefits, wellbeing packages – Annual staff survey - *HR*
- ❖ Assess take up/use of wellbeing offers – incorporated into appraisals (3 times per year) - *HR*
- ❖ Bi-annual client satisfaction survey - *CSM*
- ❖ Quarterly error rate report including clear actions for improvement - *CSM*

Creating a positive impact on society and our communities *(Responsible team)*

- ❖ Annual report on compliance data by sector/audit type - *Data*
- ❖ Annual report on young people offered work with Serve Legal, including number of auditors offered core team roles - *CSM*
- ❖ Annual report on amount raised for chosen charity - *Finance*
- ❖ Annual report on relevant awards won or selected as finalists - *CSM*