



## **Corporate Social Responsibility Policy**

Operating in a sustainable and responsible manner is an important part of our Practice. We recognise that we have a responsibility to our clients, our employees, and suppliers as well as the broader community in which we operate. We are therefore committed to encouraging a positive contribution towards improving standards for our clients and employees whilst endeavouring to minimise our impact on the environment and striving to improve the quality of the local community.

Wherever possible, the Practice will:

- Conduct ourselves responsibly and in an ethical manner.
- Create a positive and supportive working environment.
- Support local communities.
- Provide an exceptional quality service to clients.
- Act fairly in our dealings with suppliers and other third parties.
- Minimise the impact on our environment through monitoring processes.
- Support and invest in the future of our business relationships.

The Senior Management Team (SMT) has overall responsibility for our CSR strategy with Marie Moreton, Practice Manager, being responsible for assisting with the implementation of this policy. Marie has a key role in ensuring the systems and controls we have in place are effective.

Our employees have a role to play in complying with our CSR objectives and we encourage staff to make suggestions in relation to initiatives we could undertake. If a member of staff has a suggestion, please contact Marie or the appropriate line manager to discuss. As with all Company policies, we welcome suggestions from our employees as we believe the successful delivery of the Company's objectives relies on the support of all members of the Moreton & Partners team.

We are fully committed to the highest possible standards of openness, honesty, and accountability. In line with that commitment, and in accordance with our Whistle-blowing Policy, we actively encourage all staff members who have serious concerns about any real or perceived departure from the high ethical standard that we set to voice those concerns.

We will, work to ensure that our policy remains effective. As part of our ongoing assurance, this policy is reviewed at least annually to verify its effectiveness. Records of the reviews are maintained in line with the Company's Quality Management System and any necessary amendments are made to the policy and recorded in accordance with our quality standards.

### **Our Conduct**

We aim to adopt the highest professional standards and not to act in such a way as to compromise our firm's integrity.

We actively promote respect between our staff members in their dealings with each other and with clients and other third parties.

### **Our Employees**

We recognise that our staff are our most important resource. We actively seek to offer our staff a positive and healthy working environment, assist our employees to progress and to maintain job satisfaction.

We seek to ensure that all staff have access to the training they need both for their own development and to enable them to deliver a high-quality service to our Clients. Our procedures in relation to training and development can be found within our Training and Development Policy which is included within our Employee Handbook.

We consider all staff members to be equal and we aim to create a working environment which is free of unlawful discrimination, our Equality and Diversity Policy refers.

The Employee Handbook sets out the rights, expectations, and requirements of all members of staff.

Addressing the skills shortage within our discipline has become a focus for the Practice. We will wherever possible offer trainee positions and will endeavour to assist the individuals with progressing in their chosen career path which in turn benefits the Company and the industry.

### **The Community**

The Company is keen to 'give back' to the community. We regularly sponsor a local charity and include the Company in charitable events.

The Company is happy to discuss supporting charities or charitable events put forward by employees or local communities.

### **Our Clients**

We are committed to delivering a high level of service to all our clients. We understand that our business exists in a very competitive market and to retain our clients we need to deliver a professional and courteous service with sustainability being imbedded within our service provision.

### **Our Suppliers**

We are committed to eliminating unlawful discrimination and to promoting equality and diversity in our professional dealings with suppliers and other third parties.

We endeavour to enter clear and fair contracts with our suppliers which is supported by our Quality Management System. We commit to the timely settlement of suppliers' invoices.

Wherever possible, we aim to support the local economy by utilising local suppliers.

### **The Environment**

It is the policy of Moreton & Partners to provide our services consistently and efficiently within an environmentally sound framework and to continuously seek to improve our environmental performance. The Practice fully recognise that our business activities has an impact on the environment in which we operate however as a service provider we believe that the growth of our business can be achieved within a structure of sustainable development and environmental awareness.

Our objectives:

- comply and where appropriate exceed the requirements of relevant legislation, regulations, licences and codes of practice.
- with sustainable development in mind, seek to reduce adverse environmental impacts of the our business activities on the environment on an ongoing basis through seeking continuous improvements.
- reduce waste and the consumption of resources (materials, fuel and energy) and ensure unavoidable waste is recycled, reused or recovered, where possible, or disposed of responsibly to improve our environmental performance and prevent pollution.
- protect, conserve and enhance the natural environment as far as it can control.
- educate, encourage and support all staff to understand the environmental issues affecting the firm, to take responsibility for their actions and to highlight their contributions to environmental performance.
- promote an open exchange of information and dialogue relating to our environmental management with our clients, employees, suppliers and other relevant parties.
- monitor and where possible reduce the impact of our activities on the local and general environment and to support appropriate environmental initiatives within our community.
- monitor progress and review our environmental performance, objectives and targets on an annual basis.

### **Sustainability Goals**

The Company recognises that developing sustainable business practices is necessary to preserve the trust and confidence of our clients, our employees, suppliers, and the community which we believe is critical to our sustained success. We are therefore committed to operating in an effective manner and our sustainability strategy supports this vision to ensure a sustained method of carrying out our business activities.

Our objectives:

- To create value for our clients by maintaining and continuously enhancing the quality of our work, encouraging a culture of integrity and high ethical standards.
- To offer our employees training in the form of individual Personal Development Plans in accordance with RICS Regulations and aligned to the Practice succession policy..
- To understand and reduce our impact on the environment.
- To collaborate with our suppliers to minimise our environmental impacts and ensure that our fair business principles are upheld.
- To continually undertake assessments of our procedures to ensure sustainability is embedded within every aspect of our business thus enabling the improvement of our sustainability performance.

**Monitoring and review**

We will monitor the effectiveness and review the implementation of this policy, regularly considering its suitability, adequacy, and effectiveness. Any improvements identified will be made as soon as possible.

Director in Charge .....Matthew Moreton

Practice Manager .....Marie Moreton

Date: 27<sup>th</sup> April 2026