Partner Code of Conduct

Purpose Forward has established a Partner Code of Conduct (the "Code") to outline the expectations and obligations associated with the service relationship between the Client and the Supplier. While the legal relationship is that of a Supplier-Client rather than partnership, Purpose Forward is a mission-driven non-profit just like you, so we use the term "Partner" in the Code to reflect our ideal approach for working together – in a collaboration or partnership towards a common goal.

Our mission is to activate operational capacity across the grassroots social purpose sector, and we often do this with a combination of technology and revised processes, building the capacity of your team along the way. Your team likely already feels that you're spending too much time on operations/administration and not getting the value out of it. These competing priorities will occasionally create tension and our alignment on mission should help us overcome these differences without issue.

This Code has been created to ensure the parameters of our work together are clear. The Partner Code of Conduct applies to all directors, officers, staff, volunteers, and other suppliers of both Partners. It is the responsibility of the CEO/ED of each Party to enforce compliance within their respective organization. Disputes will be handled in accordance with the Dispute Resolution clauses of the Consulting Agreement.

Each Party agrees to:

Respectful communication and conduct
We value open, respectful, and professional communication in all interactions, whether in meetings, emails, or other forms of correspondence.

Everyone will:

- Engage in a constructive and professional manner, maintaining a solution-focused approach when addressing challenges and concerns.
- Listen actively and respectfully to feedback, differing opinions, and guidance provided by others.
- Avoid aggressive, hostile, or disrespectful behaviour, including raising voices, using derogatory language, or making inappropriate comments.
- The Client shall recognize the expertise and professional judgement provided by Purpose Forward. Purpose Forward shall recognize the organizational and subsector expertise held by the Client.
- Create a collaborative and supportive atmosphere that aligns with both Partners' mission, vision, and values.
- Refrain from any behaviour that could be perceived as intimidation, harassment, or inappropriate pressure on others.

Foster an ethical, inclusive, and equitable environment
For each of us to achieve our best individually and in turn collectively, we believe in the need to create an environment that treats people fairly, welcomes a diversity of perspectives, and abides by the highest ethical standards.

Everyone will:

- Foster an environment of fairness, honesty, and ethical behaviour while avoiding all forms of discrimination.
- Consistently display high personal and professional standards.

- Staff on Purpose Forward's team are governed by professional bodies, including but not limited to the Chartered Professional Accountants (CPA), Canadian Payroll Certification (CPC), and Certified HR Professionals (CHRP). Any functions governed by a profession shall be executed in accordance with the professional standards established by the corresponding professional body, along with any relevant legislation and case law.
- Engage in a manner that is courteous, professional, and conducive to a collaborative and productive working relationship.

Protect confidential and sensitive information

The nature of our partnership requires the extensive sharing of extremely sensitive personal information. We all have an obligation to take the necessary precautions to the protect this information.

Everyone will:

- Always maintain the confidentiality of all sensitive information.
- Ensure access is provided on an as-needed basis, leveraging the granular security controls that are available in most modern applications where possible.
- Audit the access to the relevant systems they are responsible for on an annual basis.
- Avoid sharing login credentials and passwords. Prior approval to share credentials is required by the CEO at Purpose Forward before staff will access a Client application with shared credentials.
- Provide links to documents rather than attaching files to emails. Purpose Forward uses automated routing rules and a ticketing system to ensure all tasks are effectively managed and actioned, so sharing attachments creates unnecessary risk of documents flowing around the public internet.
- Notify Purpose Forward immediately if you experience a security breach or have a device lost or stolen.

Purpose Forward will:

- Only store proprietary information outside of the Client's environment. Proprietary information includes mapping structures, automation flow templates, reporting templates, our policies, and instruction guides related to our proprietary tools built for you. These tools will link to the Client's environment and be accessible if we have credentials within your domain, but they do not store any sensitive, confidential, or proprietary information belonging to the Client.
- Ensure that all information stored within the Clients' systems remains in those systems, even while we are working with them. Use restricted sharing links to collaborate as needed.
- Delete files downloaded to their local device that are proprietary to the Client at the end of each day. Most applications require that reports be downloaded for analysis and further manipulation, so this need to download is unavoidable, but files should never remain locally on a device for long.
- Maintain up-to-date security on all devices used by our staff and managed by our organization.
- Perform enhanced criminal record checks on all staff, making certificates available to the Client's HR upon request.

The Client will:

- Ensure that Purpose Forward staff are granted access to the necessary information to perform our duties.
- Communicate any policies and procedures that Purpose Forward are expected to comply with.
- Maintain responsibility for your security and business continuity for all systems and information shared with Purpose Forward. This includes cybersecurity, backups, recovery, and everything related to your physical infrastructure.

Clearly establish decision-making responsibilities and processes

Purpose Forward will recommend new processes, strategic and operational decisions, and advise the Client in a variety of ways, but we cannot bind your organization.

Everyone will:

- Define the roles and responsibilities for all services delivered through the partnership. When unclear, the contract leads for each Party will be consulted and the decision documented for future use.
- Complete activities in accordance with established processes, where an established process has been defined and documented. Approval workflows are often built through automation, so circumventing established processes can lead to delays.
- Ensure they understand all Client policies and procedures associated with activities within scope, complying with all approval requirements as established.

Purpose Forward will:

- Provide advice, recommendations, and guidance where we are legally authorized to do so and have the relevant expertise to add value. We will not bind your organization in any capacity, including but not limited to releasing payments without evidence of appropriate approval (to vendors or staff), signing contracts or agreements, and hiring or terminating staff.
- Draft requests for approval, coordinate obtaining approval, and store evidence of approval for audit purposes.
- Execute requests that have documented evidence of approval in accordance with the relevant policy or procedure.

The Client will:

- Perform all necessary due diligence before approving any requests. We occasionally must make judgement calls and we aren't perfect, approvers play a key role in risk management.
- Ask questions and request additional information when unsure. We want you to have confidence when performing this important function.
- Accept all responsibility for the outcomes that result from these decisions.