

Carter Jonas ESG Policy

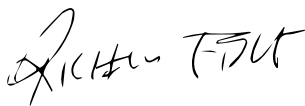
Introduction

Carter Jonas is a UK-based multi-disciplinary property partnership providing residential, commercial, rural, and planning and development advisory services. We help clients realise their goals and aspirations by providing 'simply better advice'.

Our values are:

- **Approachable:** We treat every relationship with respect, integrity, and warmth.
- **Ambitious:** We are ambitious for our clients and for our firm.
- **Effective:** We do what we say we will, we do it well and we are accountable.

Consistent with our values, we recognise our own responsibilities and impacts as a business, including the sustainability issues that affect us, our clients, and our stakeholders, and over which we have control or influence.



Richard Bruce
Chief Executive

December 2023

Context

The environmental, social and governance (ESG) agenda has grown in prominence over recent years, including within the property sector of which we are proud to be part. The resilience and long-term success of property assets and businesses are inextricably linked to their ability to keep pace with the demands, opportunities and pressures presented by our rapidly changing world; a world in which critical environmental and societal limits are now being breached with far-reaching, systemic consequences.

Expectations of individual firms, both in the context of their corporate activities and the professional services they provide, have been rising rapidly as a result. Our clients rightly look to their advisors to assist them in achieving better environmental performance, delivering more positive outcomes for people and communities – all with greater transparency and accountability. At the

same time, they expect their commercial requirements to be met.

Our People Strategy 2025 sets out our commitment to being an open and inclusive organisation. Everyone has a responsibility to champion equality and diversity within the business. They also have the right to work safely and flexibly in environments that enhance their wellbeing, and to enable them to make a positive mark in society, whilst at the same time delivering good results for our clients.

Our industry has a role to help deliver value and positive outcomes for the environment, society, and the economy. For Carter Jonas, that means creating a positive legacy in the communities in which we work, both directly through our corporate activities, and the influence we have when advising our clients and working with stakeholders.

Purpose and Scope

This ESG Policy sets out how we integrate environmental, social and governance considerations into the way we work across our business. It sets out the principles that guide us, our immediate and longer-term priorities and goals, and the commitments we have made in our pursuit of them. It applies to all our operations and corporate activities, as well as to the professional services delivered by all our people, and consultants across our service lines.

In seeking to be a force for good, and positive change, we encourage our partners across our value chain, including our clients, service providers and suppliers to identify opportunities for us to work together in the pursuit of shared sustainability goals. We invite them to let us know how they think we are doing, and to challenge us to do more.

This document supported by a range of policies with focus on specific areas of our programme. These include our Environmental Policy, our Health and Safety Policy, and our Modern Slavery Statement. These documents are all publicly available from [our website](#).

Our ESG Objectives

Carter Jonas' approach is focused on where we can make the most difference. We want to be known across the property industry for our purpose-led, sustainable, and distinctive approach to business.

In part, this means building on the strides we have made in cultivating an inclusive and ambitious team culture by putting outstanding, outward-looking corporate citizenship and responsibility at the centre of how we think. It also means making sure our people can support our clients in shaping their property assets for everything that the future will demand of them.

Our overarching strategic ESG priorities are to:

- Deliver our People Strategy 2025 to be the best place to work within the industry, ensuring that we are a model of safe, healthy and inclusive working practices;
- Achieve net-zero in our scopes 1 and 2 emissions by 2035. By 2025, develop and publish an approach to achieving net-zero scope 3 emissions by 2040. Limit the use of offsets to no more than 10% of our baseline;
- Maximise the social value we deliver as a business, both directly through our corporate activities as well as through the advice and support we provide to our clients;

- Provide regular training to educate and motivate our people to adopt ways of working to improve sustainability within the workplace and provide best advice to our clients;
- Engage and collaborate openly with our peers and industry partners in seeking to disrupt the barriers to progress on key systemic challenges, with a particular focus on tackling health inequality, and social exclusion;
- Ensure that our primary supply chain work with us to help achieve our objectives by engaging with them to deliver best practice, adhere to industry standards on modern slavery, GDPR and other relevant legislation; and
- Create opportunities for small and medium sized enterprises to provide goods and services as part of our supply chain.

Our Approach To ESG

Carter Jonas' ESG approach is guided and underpinned by the following core principles:

ESG integration into client services

- We will engage with our clients and stakeholders to deliver a sustainable future.
- Integrating material ESG considerations into our professional advice, especially those relating to climate change, environmental and social impact, health, wellbeing, diversity, and inclusion, across all property types and lifecycle stages we advise on.
- Through research, trends analysis and strategic foresight, helping our clients to anticipate and respond to the evolving demands on property and place, so that their assets are resilient to social, economic, and environmental change.

Partnering and business relationships

- Taking a principled and values-based approach to all stakeholder relationships, including by aligning our strategic partnerships with our sustainability aspirations and ambitions.
- Improving the ESG requirements we place on our suppliers and service providers and working with them constructively so they can respond accordingly.

ESG Integration Into Our Operations

- Uphold the highest standards of internal governance, including by insisting on a culture of accountability and transparency through which we will be open with our people, clients and other stakeholders on progress towards our sustainability goals.
- Seeking independent verification of our environmental performance and social impact, including through recognised industry accreditations.
- Exceed our statutory compliance obligations and assist our clients to do the same.
- Leveraging our knowledge and experience to provide thought leadership on sustainability to the wider industry and backing this up with practical solutions where we can.
- Maintain our ISO9001 Quality Management System, ISO14001 Environmental Management System, ISO45001 Health and Safety Management System and ISO14064 verification of our carbon footprint.

Using Data and Intelligence Wisely

- Leveraging best-in-class technology and data management systems to optimise our use of space, the performance of our offices and the assets of our clients, particularly from resource efficiency, greenhouse gas emissions, health and wellness points of view.

Community Support and Charitable Giving

- Providing funding or match funding to our employees' charitable efforts for our charity partners, LandAid and Pathways to Property.
- Sponsoring one entry fee per year per person for fund raising activities for either of our chosen charitable partners.
- Providing two days paid leave per financial year for volunteering for our charity partners or a recognised charity of the individual's choice. This is given at the total discretion of the Line Manager.

Role and Responsibilities

Carter Jonas' Management Board, chaired by our Chief Executive, takes responsibility for establishing and developing our sustainability policy and ensuring that our sustainability goals are achieved. Within the Management Board, the Head of Residential is the lead Partner for sustainability issues.

We have an established Sustainability Group which has representatives from all our Divisions and business functions. The Sustainability Group is responsible for promoting sustainability best practice across our business and reporting on progress against our sustainability goals to our Management Board.

The Social Impact Group is responsible for overseeing and directing Carter Jonas's philanthropic activities, partnering with our chosen charities to maximise the positive impact our people can have through their volunteering activity.

Role	Responsibility
Chief Executive	Overall responsibility for the development and delivery of Carter Jonas' ESG strategy.
Management Board	Responsible for the approval of the ESG Policy and delivery of progress against.
Lead Partner	Responsible for championing sustainability issues among the Management Board.
Head of Sustainability	Responsible for developing and delivering against Carter Jonas' ESG strategy, targets, and policy.
Sustainability Group	Responsible for championing sustainability across the business and promoting best practice within divisions and teams.
Social Impact Group	Responsible for directing and championing Carter Jonas' charitable activities and volunteering efforts.

Our ESG management framework

To reflect the importance of ESG within Carter Jonas a formal structure has been adopted both for the formulation and adoption of the ESG policy and the administration and management of our annual objectives in support of the policy.

By adopting this approach we will ensure that we will achieve, and ideally exceed, the objectives we have set ourselves.

Vision 2025	Our five-year business plan sets out broad principles around sustainability
ESG policy	Our detailed policy statement that sets out clear high level aims and objectives for the firm. The policy is owned by the Management Board and is regularly updated.
ESG strategy and targets	Our targets provide the framework for us to deliver on our key sustainability objectives. Our progress against our targets is reported publicly on an annual basis.
Annual ESG Report	The Annual ESG Report is published and circulated internally and externally. It showcases the work we are doing, the initiatives we have undertaken and the overall progress against our targets.

Supporting documents

[Environmental Policy Statement 2023](#)

[Health and Safety Policy Statement 2023](#)

[Modern Slavery Act Policy Statement 2023](#)

[Quality Policy 2023](#)