



GLOBAL

EMPLOYEE HANDBOOK



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Note: The following information / language used in this Handbook does not constitute a contract of employment. Nor does it in any way modify or supersede any of the terms and conditions as set out in the Offer Letter and / or Contract of Employment, nor any statement on policy which has been issued by the Company.

The contents of this handbook are summary guidelines for employees and therefore are not all inclusive. Every effort has been made to ensure that the policies in this handbook comply with Country Specific National Law and Local Statutes, but in the event of any inconsistencies the local country law will of course take precedence.

The company reserves the right to review, revise, amend or replace the contents of this handbook, as well as introduce new policies from time to time to reflect the changing needs of the business.

The handbook is for internal use only.

Introduction

This handbook has been designed as a source of reference, and an aid to all Planview employees regardless of their stage of employment. The handbook is designed to provide all employees with information about the working conditions, employee benefits, and the policies/procedures affecting everyone's employment that are not included in the country specific Terms and Conditions of Employment.

Every effort has been made to ensure that the details contained within this handbook are as up-to-date and accurate as possible. With any amendments that may affect employees working environment, due notice and information will be provided. If you have any queries concerning the information contained in the handbook, please consult HR.

Future of Connected Work

Planview is a global community of industry-leading innovators and experts working to build the future of connected work. We are a company that lives our core values, recognizes talent, and we provide our employees with the tools and support they need to build meaningful careers. Our culture reflects the global diversity of the communities in which our teams live and work. We understand that life requires balance, and we offer traditional and non-traditional benefits to help you be your best self, personally and professionally. Where you work is part of the equation, but who you work with is critical to finding the right fit. Planview is a company where each person's story is valued, everyone's opinion matters, and building relationships is about connecting as people to support each other's success.

On top of all of that, Planview is a multiple-award-winning industry leader empowering our customers to succeed in an ever-changing, global business environment. Our solutions provide our customers with comprehensive visibility into their critical activities, priorities, and strategies. The work we do is exciting, and the people we do the work with are inspiring; we love being part of the Planview team and know you will too!

#Life@Planview

Life at Planview is different for everyone. Planview does not take a "one size fits all" approach to hiring, managing, developing, and supporting our employees because we look for and celebrate all the differences in our teams. Planview's culture reflects the vibrant communities in which our employees live and work.

Today employees want to have more choices and control over where and how they work. Planview creates solutions that connect businesses from ideas to impact, empowering companies to accelerate the achievement of what matters most. So, it is only natural that we have developed a world-class, connected culture that supports you to be successful from anywhere.

The philosophy of Planview is built upon the premise of hiring the most motivated individuals available in the market today. The Planview team comprises of overachievers with the ability and commitment, as well as the enthusiasm and the drive, to give their best to their co-workers and clients. It is this unique synergy and special attitude towards exceeding our clients' expectations that has made us so successful within the marketplace today.

Our Vision and Mission

Our Mission:
To build the Future of Connected Work

Our Vision:
We connect your business from ideas to impact, empowering you to accelerate the achievement of what matters most.*

*And by "you" we also mean "us." We use our solutions all day, every day to confidently run our own business. It's how we know how well they work.



Our Core Values



We Take **OUR MISSION**
(But Not Ourselves) Seriously

We are passionate about building the future and helping our customers succeed. And we create the space to be yourself, every step of the way.



We **BUILD TOGETHER**

We continuously innovate and pursue new ideas that are worthy of our teams and customers. We learn and explore together – and when things don't go as planned, we have each other's backs.



We **DO THE RIGHT THING**

We put people first and do what we say we're going to do. Even when it isn't easy.



We **VALUE OUR DIFFERENCES**

We champion diverse perspectives, shared belonging, and uncompromising respect for each other. We believe diversity, equity, and inclusion are foundational to our ability to thrive.



We **STRENGTHEN CONNECTIONS**

We believe anything's possible when people work together on the things that matter most. We break down silos and collaborate fearlessly across levels, functions, and borders.

Employment

Pre-Employment Screening Checks

The company wishes to ensure that it hires individuals that meet specific job requirements, that have the right to work in the country where they are based, pose no undue security risk, and can be identified as the person they claim to be. It is therefore necessary to verify several key facts that are provided on job applications and during the interview process.

It is a condition of your employment that we receive a clear background check. We will conduct screening for these checks [verifying identity, verifying the right to work, verifying employment history and qualifications, and verifying criminal records] pre-employment prior to joining the business.

All vetting shall take place in compliance with local laws and accepted work practices. This includes following GDPR regulations and country specific privacy and security legislation in countries where this is applicable. Here at Planview we use a specialized verification agency to conduct this on behalf. Data obtained during this process is maintained securely in strict confidence and accessible only to HR.

Occasionally we are required to perform screenings during employment due to customer requirements if a Planview employee is working on customers premises/systems. The above process will be followed for these situations.

Probation

All new appointments outside of the US and Israel are subject to the satisfactory completion of a probationary period. The duration of the probation period is;

- 3 months – India and Canada
- 4 months – France
- 6 months - UK, Germany, Sweden, Belgium, Italy, Singapore, Australia

During this time, you will be placed through an induction program with regular reviews. Planview will make every effort to assist you during this time, to enable you to become familiar and competent in performing the work you have been appointed to do.

Planview reserves the right to extend the probationary period in certain locations where permitted by employment law, and in circumstances where your manager (at their sole discretion) is not satisfied with performance and feels that an extension would be appropriate.

Following the probationary period, notice will be required from the Employee and Employer as per individual terms and conditions. HR will notify you of any specific requirements of your probationary period.

Compensation

Salary

Your salary is stated on your Offer Letter, and if applicable your Contract of Employment, and will be paid in intervals as set out below, in arrears, into your nominated bank account each month. Whilst every effort is made to despatch salaries promptly, Planview cannot be responsible for errors or delays because of the banking system.

Pay Dates

- Semi-monthly on 15th and 31st – Canada & US
- Monthly on 25th - all other locations

It is Planview's policy to review all salaries on an annual basis. The purpose of salary reviews is to reward performance, motivate high performing and high potential employees. A pay review does not automatically lead to a pay increase.

Please note that an annual pay increase is not an automatic right. The only exception is when salary is linked to statutory bargaining agreements with national unions (Sweden, Belgium & Italy). In such cases any awards given because of statutory agreements will be taken into consideration in the overall review process.

Time Reporting

Certain locations / departments require time sheets to be created and submitted using the time keeping system in place in that country.

Deductions

National and Local laws in each country requires the Company to makes certain deductions from every employee's compensation. Among these are applicable income taxes. The Company offers programs and benefits beyond those required by law. If you are eligible to receive these benefits, you may voluntarily authorize deductions from your paycheck to cover the costs of participation in these programs, if required.

Other pay deductions are taken by the Company, such as a wage garnishment required by court order.

Commission / Bonus Plan

If you are eligible for a Commission Plan / Bonus Plan, then the structure of this plus the specific terms and conditions will be issued to you in a separate document. Plans are reviewed annually, and confirmation of the structure will be issued at the start of the year by your manager.

Employee Referral Bonus

We strongly prefer to hire candidates endorsed by our team. The most credible form of referral is a friend-to-friend recommendation and Planview operate a "Refer a Friend" scheme.

If you refer a candidate to Planview, you will be eligible to receive a bonus subject to the following guidelines;

- The referring employee should know the person, and know enough about them, to recommend them as a potential Planview employee.
- Director level and above, HR, and managers within the hiring chain of the open position are **ineligible** for the Employee Referral Bonus.
- You must not be the direct manager for the referral.
- You cannot be related to the referral; this includes spouse and life partner.
- If your referral candidate has previously applied to, interviewed with, contracted with, or worked for Planview, you will not be eligible for the referral bonus.

- You must have your referral candidate apply to the job opening they are interested in via Planview's career site, and during the application process they will need to list your name as the referral name.
- This bonus is paid in the first payroll after the successful completion of the referral employees' probationary period (for the US & Israel the new starter must complete 90 days).
- You must be employed at the time the referral payment is due.
- The referral bonus amounts are;
 - UK £2,500
 - EMEA €2,750
 - India 70,000 INR
 - US \$3,000 USD
 - Canada \$3,850 CAD
 - Sweden SEK 30 000
 - Israel 10,500 ISR
 - Australia \$4000 AUD

Time Off

Entitlement

You are entitled to receive paid time off, in addition to the National Public Holidays in your country of employment.

The following guidelines apply;

- The number of days you are entitled to are detailed in your Offer of Employment Letter / Contract of Employment.
- The holiday year runs from 1st January to 31st December, except for France which runs from 1st June to 31st May.
- The Company believes that it is good practice for employees to take regular holidays.
- Employees must use the required time off tool to request permission from their manager for all time off.
- Holidays will be agreed with your manager upon consideration that the days requested would not interfere with the needs of the business. You should not commit yourself to holiday arrangements, travel bookings etc. without the prior agreement of your manager.
- To ensure that the business operates effectively Planview reserves the right to restrict the number of employees taking holidays at peak times. In the event of many employees seeking leave at the same time, your manager will allocate provision on a first come, first served basis.
- You should endeavour to take your full annual entitlement during the holiday year. Carrying over holiday to the following year is based on the rules in force in your country of employment.
- Where notice of termination has been given holidays may be taken provided, they have been booked in advance. We also may ask that you take any outstanding holiday entitlement during your notice period.
- Any accrued holiday outstanding on termination of employment will be calculated based on the number of complete months worked in the year. A payment will be made in lieu of any outstanding holiday, subject to the normal tax deductions.
- If on leaving, more holidays have been taken than the pro-rated entitlement, the number of days in excess will be deducted from the final salary.

National Holidays

Planview follows the required national, provincial, and federally legislated leave in every country where the business has employees based. A calendar of dates is published and available for all employees to reference.

Time Off Work

Sickness

If you are unable to come to work or are leaving work due to illness you should inform your manager as early as possible and / or by 9.00am on the day of absence.

If you are subsequently unable to come in due to sickness prevailing, then further notification should be made to your manager explaining the reason for your absence and the likely date of your return.

For applicable countries outside of the US, your contract of employment details the rules that must be adhered to with regards to sickness absence regulations in your country of employment.

Absence statistics are collated by HR to ensure that absenteeism remains at an acceptable level and there is no adverse impact on operational capacity.

The full circumstances of any illness will be considered, and anyone with a serious illness or disablement will continue to be treated sympathetically in accordance with Planview's policies.

Where a sickness record is unacceptable i.e., not justified or not correctly documented the Planview reserves the right to implement disciplinary procedures.

Family Medical Leave Act (FMLA) – US Employees Only

If you are based in the US, the Family and Medical Leave Act (FMLA) provides eligible employees with the opportunity to take an unpaid, job-protected leave in the event of certain family and medical events. State or local law may allow for additional leave. To be eligible for FMLA benefits, you must meet the following requirements:

- Have more than 12 months of service; and
- Have worked at least 1,250 hours during the previous 12-months period before the need for leave; and
- Be employed at a work site that has 50 or more employees within a 75-mile radius.

Parental Leave – Birth Parent

If you become pregnant, then please inform your manager and HR as soon as possible. Planview will follow all statutory legislation in force at the time regarding Parental / Maternity Leave.

Once you inform HR, full details regarding Parental / Maternity Leave and your entitlements under the prevailing legislation at the time will be provided. Planview provides an enhanced benefit of 12 weeks full pay for the birthing parent as long as you have been in employment for a minimum of 1 year

Parental Leave – Non-Birth Parent

Planview provides an enhanced benefit of 9 weeks full pay for the non-birthing parent. This is also available following the placement of a child for adoption. Leave must be taken within 1 year of child's birth or adoption and can only be taken as minimum 1-week increments. You must have been in employment for a minimum of 1 year to be eligible for this benefit.

Flexible Working

You can request flexible working arrangements in line with the legislation in force in your country of employment.

Planview will consider request for flexible working seriously, however there is no automatic right to work flexibly and there may be circumstances where Planview is unable to accommodate your request for flexible working arrangements.

Unpaid Leave / Sabbatical

Application for unpaid leave must be made in writing to your manager. Consideration will be given by the absolute discretion of your manager / HR.

Moving Day

In the event of moving to a new house, you are entitled to one day off without salary reduction. Proof of the move will need to be sent to HR.

Bereavement

Planview provides time off for mourning after the loss of an immediate family member. Immediate family includes spouse/partner, child, stepchild, parent, sibling, grandparent, or parent-in-law. If you require leave on compassionate grounds, please speak to your manager who has discretion over such matters in addition to what is mandated by legislation.

Jury Service

Jury service is compulsory and failure to turn up is a criminal offence.

Planview will provide limited income protection while a regular full-time employee carries out their required responsibility. Upon receipt of notification from the court of an obligation to serve on a jury or to act as a court witness, the employee should notify their manager and HR.

You will be required to provide copies of the subpoena or jury summons to HR prior to taking leave.

Regular full-time employees summoned to serve jury duty will receive their regular daily pay, less any compensation received for the court appearance, up to a maximum period of two weeks. The employee will be required to provide certification of such pay to HR.

Time Off for Voting

Planview recognizes employees' civic responsibility to participate in elections. Generally, employees can find time to vote either before or after their regular work schedule. If employees are unable to vote in an election during their nonworking hours, Planview will grant up to two hours of paid time off to vote, unless mandated otherwise. Employees should request time off to vote from their manager.

Military Leave (US Employees Only)

A military leave of absence will be granted to eligible employees to attend scheduled drills or training or if called to active duty with any of the U.S. armed services. Employees may use any available accrued paid leave for this absence. Otherwise, the leave will be unpaid. Employees must provide appropriate orders documentation upon receipt to their manager & HR.

Employees taking a military leave of less than 31 days will be entitled to continue group health plan coverage under the same conditions as if the employee had continued active work. Those employees taking a military leave of more than 31 days may elect to continue health coverage for up to 18 months of uniformed service and will be required to pay in full for the premium of elected coverage. Employees and/or eligible dependents that elect to continue their coverage will have to pay 102% of the full premium for the coverage elected. Accrued paid time off, such as vacation and sick leave, will be suspended during the leave and will resume upon the employee's return to active employment.

Employees on leave for less than 31 days must report to work no later than the beginning of the first regularly scheduled work period on the first full calendar day following the last day of service and following the expiration of 8 hours after a period allowing for the employee to return safely from the place of service to his/her residence. Employees on longer military leave must apply for reemployment in accordance with all applicable state and federal laws. Employees on military leave will be eligible to return to employment at Planview consistent with applicable law. For more details, please contact HR.

Reservist Leave (Canadian Employees Only)

Employees required to take time off to serve in the Canadian Forces reserve force or to participate in annual training programs, may be eligible for unpaid leave. Please contact your HRBP for further details.

First Day off School for Parents / Guardians

Parents / Guardians are entitled to have their child's **first** day at full-time school off. This is an extra entitlement and is in addition to your holiday allowance. This is one time benefit and is only applicable the first time your child starts full time school.

Conduct and Behaviour

What We Expect from You

It is important that we are clear on what we expect from you and how we work together. We want to achieve the highest standards and your job title and description gives you a guide to your duties which will be fully explained by your manager. However, we all must be flexible in the work we do, and you are required to comply with any reasonable request to promote the smooth running of the business.

Basic standards required on a day-to-day basis are that you:

- Devote all your time, attention, and abilities during your working hours to Company business.
- Carry out your duties with diligence and reasonable expertise.
- Treat Planview property with due care and avoid waste.
- Be courteous to colleagues, customers and others having business with Planview.
- Observe Planview policies and procedures.
- Demonstrate the Planview values.

Company Ethics

At Planview we believe that;

- Business should be conducted honestly, fairly and with respect for people, their dignity, and their rights.
- We treat people with equality, fairness, and respect, with no partiality due to favouritism or self-interest and we do not discriminate on any basis.
- We encourage a welcoming and inclusive work environment in which people are expected to be open, honest, and courteous with each other.
- We aim to communicate with concise and clear language.
- We expect honesty and truthfulness as a matter of course.
- We should act with integrity and good conscience always.
- Our dealings and activities should stand up to critical scrutiny.

As a responsible corporate employer Planview Inc. and sister companies throughout Europe and APAC, are committed to the 10 principles of the UN Global Compact as defined by the UN Global Compact Network. The 10 principles are:

Principle 1: Businesses should support and respect the protection of internationally proclaimed human rights; and

Principle 2: make sure that they are not complicit in human rights abuses.

Principle 3: Businesses should uphold the freedom of association and the effective recognition of the right to collective bargaining;

Principle 4: the elimination of all forms of forced and compulsory labour;

Principle 5: the effective abolition of child labour; and

Principle 6: the elimination of discrimination in respect of employment and occupation.

Principle 7: Businesses should support a precautionary approach to environmental challenges;

Principle 8: undertake initiatives to promote greater environmental responsibility; and

Principle 9: encourage the development and diffusion of environmentally friendly technologies

Principle 10: Businesses should work against all forms of corruption, including extortion and bribery.

Planview takes very seriously the legal responsibilities, ethical commitments and principles defined in these policies. All new employees are made aware of the policies during their induction process and are required to sign in acknowledgement and commitment to them.

Antitrust and Fair Competition

Antitrust laws, sometimes called competition laws, govern the way that companies behave in the marketplace and encourage competition by prohibiting unreasonable restraints on trade. Planview is committed to fair and open competition and intends to follow these laws. Therefore, when conducting company business, we expect you to:

- Truthfully communicate about our products and our competitors' products.
- Focus on what customers should do with Planview, not what they should not do with our competitors.
- Make design decisions that are based on improvements to our products.
- With the exception of standard non-solicitation agreements, not agree with other companies to limit hiring or recruiting of each other's employees or to set employee compensation or benefits.
- Not communicate with competitors about price, cost, terms of sale, production levels, allocation of markets, or other competitively sensitive information.
- Not agree with competitors to not sell to or buy from another company.

Keep in mind that agreements do not have to be signed contracts to violate the law. An informal understanding between you and a competitor, or even a conversation that implies an understanding, can be problematic. If any of these topics come up while you are talking with a competitor, stop the conversation immediately and consult Legal.

For all Planview employees in customer-facing roles related to sales or renewals, it is critical to avoid certain practices in order not to run afoul of competition laws. Specifically:

Do not allow side letters, and all commercial terms, promises, or commitments, including those impacting pricing, discounts, and margins, must be memorialized in a formally approved written contract, quote, or PO approved by Finance and Legal. Informal agreements on pricing, discounts, or margins via emails or other written or oral communications with partners or end-customers is not sufficient.

- Do not provide or guarantee pricing, discounts, or margin outside of the official deal approval process.
- Do not proactively solicit or require pricing, discount, or margin information from the channel beyond what is needed for a specific deal, and only if needed to facilitate completing that deal.
- Unless you have advance approval from Finance and Legal, do not set a blanket or fixed price, discount, or margin for future deals involving a particular distributor or reseller.
- Unless you have advance approval from Finance and Legal, do not set or recommend future minimum, maximum, or suggested end-customer pricing, discounts, or margins.
- Unless you have advance approval from Finance and Legal, do not share pricing, discount, or margin information about one distributor, reseller, or end-customer with another distributor, reseller, or end-customer.

Following Procedures

We expect the highest standards of personnel conduct from you at all times, and we have established rules and procedures throughout the business. You are expected to observe all the policies stated in this handbook and others that you are made aware of by your manager / HR, as we continue to improve our standards and procedures.

Encouraging integrity in our business is vital to our continued success. This means that we expect you to highlight the following matters to your manager / HR if you become aware of them:

- Inaccurate accounting
- Fraud or theft
- Inaccurate or fraudulent claiming of expenses
- Conflict of interest
- Deliberate damage to Planview property
- Any form of harassment or discrimination
- Receiving bribes, favours, or entertaining illegal activity
- Any other wrongdoing

If you are unable to follow some aspect of a Company procedure, you must report this to your manager / HR immediately. Failure to follow our procedures may lead to disciplinary action being taken against you.

Misconduct Outside of Work

If an employee's actions outside of the workplace are such that they may damage the reputation of Planview, erode the mutual trust and confidence of the employment relationship, adversely impact the ability of the employee to properly perform their role or otherwise present a risk to the business, then Planview may consider it necessary, reasonable or proportionate to take disciplinary action against the employee and possibly dismiss (depending on the facts).

Personal Presentation

Standards of professional dress, grooming and personal cleanliness contribute to the moral of all employees and affect the business image that Planview present to customers, visitors, and colleagues. All employees are expected to present a professional image and you should choose business casual clothing that communicates professionalism and represents Planview accordingly.

Workplace Guidelines

Workplace Security & Safety

Office Security

The Company's aim is to protect its employees, visitors and others who may come into contact, by establishing adequate and effective security procedures. In the interest of security, please ensure that you understand and comply with the following security measures:

Visitors to our offices: Please ensure that you ask all visitors to notify Reception. Whenever possible notify Reception of any visitors in advance, and escort visitors around our premises always.

Employee access to our office: If you are based in one of our offices you will be issued with an Access Card. It is your responsibility to look after this and inform the Office Manager immediately should it be misplaced. It will be your responsibility to pay for a replacement card / key. Failure to comply with this procedure could cause detrimental effects to either you or one of your colleagues in case of an emergency.

Personal Property

Planview accepts no liability for any loss or damage to personal property that may occur on company premises. Therefore, it is advisable not to bring anything of great monetary or sentimental value to work. If you are working from an office, you should ensure that your desk is cleared of all material at the end of the day. This is to promote a professional image and to ensure that any sensitive or confidential documents are not left in view.

Company Insurance

In accordance with the statutory requirements, Planview maintains Employers Liability Insurance in respect of all employees working for the Company.

Lactation Policy

In our offices we will comply with local legislation regarding providing a private space. In the US the Company will comply with the California Labour Code, the company will provide a room, or a private space shielded from view and free from intrusion to accommodate nursing employees' lactation needs. The lactation room shall remain a safe and clean space free from hazardous materials, contain a surface to place a breast pump and personal items, and a place to sit and have access to electricity or alternative devices to operate an electric or battery-powered breast pump. There will also be access to a sink with running water and a refrigerator suitable for storing milk. Per the California Labour Code, the company will provide additional break time to nursing employees who need it for lactation purposes.

Smoking & Tobacco Policy

Everyone must adhere to their local government policy on smoking / vaping in public places.

- Smoking, vaping, or any other form of smokeless tobacco is prohibited in the office.
- Smoking, vaping, or any other form of smokeless tobacco is prohibited in the remote work environment whilst on online meetings.
- No smoking or vaping allowed within the immediate vicinity of the office.
- All cigarette ends need to be disposed of correctly and not discarded randomly.

Equal Opportunities and Diversity

Planview is an Equal Opportunities employer and committed to providing a non-discriminatory employment environment for all of its employees.

The policy of Planview is to fully comply with all applicable national legislation, federal, state, and local laws, rules, and regulations in the area of non-discrimination in employment. Discrimination against employees and applicants due to race, colour, religion, gender, gender identity or expression, national origin (ancestry), marital status, military status (past, present or future), veteran status, aboriginal status, disability, age, sex (including sexual harassment), sexual orientation, genetic information, national origin, physical or mental disability, pregnancy disability (including childbirth, or breastfeeding or related medical conditions), medical conditions, political affiliation or any other class protected by law or in making certain employment-related decisions is prohibited. Violations of this policy will be subject to discipline, up to and including termination.

It is strongly believed throughout the Company that it is an individual's ability, which is the most important quality regarding whether they are offered a position, given a promotion, or receive any special training. Any acts of unlawful discrimination by any employee regardless of status will be treated as a serious disciplinary offence.

Equal employment opportunity and non-discriminatory commitments include, but are not limited to, areas of hiring, promotion, demotion or transfer, recruitment, discipline, layoff or termination, rates of compensation and eligibility for in-service and company sponsored training programs.

Our employment policies for recruitment, selection, training, development, and promotion are designed to ensure that no job applicant or employee receives less favourable treatment on the grounds of race, colour, nationality, ethnic or national origin, religion, gender, sexuality, age, or marital status. This means that no-one will be treated any less favourably on these grounds in any way and Planview will ensure that individuals are selected, promoted, and treated based on their relevant aptitudes, skills, and abilities. Planview will employ the best qualified person for the job and will provide equal opportunities for training, promotion, and progression. The Management team at all levels has the primary responsibility for the successful application of the policy: -

- By not discriminating during employment against fellow employees or job applicants.
- By not inducing or attempting to induce others to practice unlawful discrimination.
- By bringing to the attention of employees that they will be subject to disciplinary action for failure to adhere to the policy.

Employees have the responsibility to ensure they assist in the implementation of the policy: -

- By not discriminating during their employment against fellow employees, customers, suppliers, or members of the public with who contact is made.
- By inducing or attempting to induce others to practice unlawful discrimination.
- By reporting any discriminatory action to the Management Team.

Any employee who believes they have been discriminated against must immediately file a complaint with the Chief People Officer. The company will not tolerate retaliation against any employee who reports acts of discrimination or provides information in connection with any such complaint. If you have questions regarding this policy, please reach out to HR.

Disability Discrimination

Planview complies with its responsibility in line with the Disability Discrimination regulations, whereby it will make any reasonable adjustment to enable an employee with a disability to be able to carry out their job functions. Planview welcomes applications for employment from disabled people, and everyone will receive full and proper consideration for any position for which they apply.

Victimisation, Discrimination & Retaliation Prevention

Planview is committed to providing a workplace environment free of sexual and other unlawful harassment, discrimination, and retaliation. Planview strives to create an atmosphere of professionalism where every employee feels comfortable exchanging ideas, information, and opinions regarding work projects. For this exchange to take place, the environment must promote the confidence to work, to innovate and to perform without fear of harassment, discrimination, or retaliation.

This policy protects all applicants and employees (including, without limitation, interns) from unlawful harassment and discrimination by any employee of the Company, including supervisors and managers, as well as independent contractors, customers, vendors and other third parties who engage in business with the Company.

Similarly, Planview will not tolerate harassment or discrimination by its employees or non-employees with whom Planview employees have a business, service, or professional relationship.

All Company personnel are expected to avoid any conduct that could be construed as harassment or discrimination by any employee. If job-related harassment or discrimination occurs by someone not employed by the Company, the procedures in this policy should be followed.

Planview strictly prohibits unlawful harassment and discrimination based upon race, religion, colour, sex (including pregnancy, childbirth, or breastfeeding or related medical conditions), gender identity or expression, marital status, sexual orientation, age, physical or mental disability, medical condition (including cancer or genetic characteristics), political affiliation, or any other classification that is protected under applicable federal, state or local laws ("Protected Characteristics"). It is the policy of the Company to also prohibit unlawful harassment and discrimination based on the perception that anyone has a Protected Characteristic or is associated with a person who has or is perceived as having a Protected Characteristic. This protection against harassment includes conduct involving employees, managers, customers, vendors, guest, or suppliers.

Sexual and Other Harassment

Harassment includes all forms of offensive or unwelcome physical or verbal conduct that interferes with an employee's work or creates an offensive or hostile working environment. All such harassment based on a Protected Characteristic is unacceptable and will not be tolerated.

Sexual harassment of employees in the workplace is specifically prohibited. Sexual harassment is defined as unwanted sexual advances (either verbal or physical), requests for sexual favours, and other verbal or physical conduct of a sexual nature when:

- Submission to such conduct is made either explicitly or implicitly a term or condition of employment;
- Submission or rejection of the conduct is used as a basis for making employment decisions; or
- The conduct has the purpose or effect of unreasonably interfering with work performance or creating an intimidating, hostile, humiliating or sexually offensive work environment.

Hostile treatment of a sexual nature can amount to unlawful sexual harassment whether motivated by sexual desire.

Prohibited sexual harassment, if severe or pervasive, includes, but is not limited to, the following behaviour:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations, or comments;
- Visual conduct such as derogatory and/or sexually oriented posters, photography, cards, cartoons, drawings, or gestures;
- Physical conduct such as assault, unwanted touching, blocking normal movement or interfering with work;
- Threats and demands to submit to sexual requests as a condition of continued employment, or to avoid some other loss, and offers of employment benefits in return for sexual favours; and
- Retaliation for having reported or threatened to report harassment.

Discrimination

Discrimination is making an employment decision, denying someone an employment benefit, or otherwise treating someone less favourably, based on a Protected Characteristic. As discussed in our Equal Employment Opportunity Policy, the Company prohibits discrimination with respect to all terms and conditions of employment, including (without limitation) recruitment, selection, hiring, training, promotion, compensation, benefits, transfer, social programs, performance management, participation in company events and programs, discipline, and termination.

Retaliation

Retaliation is an adverse action taken against someone because he or she filed a charge of discrimination, harassment, or retaliation, complained to his or her employer or other covered entity about discrimination, harassment, or retaliation on the job, participated in an employment discrimination, harassment or retaliation proceeding (such as an investigation or lawsuit) or otherwise exercised rights under this policy. Examples of adverse actions include but are not limited to: (1) employment actions such as termination, refusal to hire, and denial of promotion, (2) other actions affecting employment such as threats, unjustified negative evaluations, unjustified negative references, or increased surveillance, and (3) any other action that is likely to deter reasonable people from pursuing their rights.

Reporting Process

If you believe that you have experienced or witnessed harassment, sexual or otherwise, discrimination or retaliation, please immediately report it to your manager or HR. If for any reason you are uncomfortable doing so, to any other management team member as soon as possible after the incident. Once this has been done, we request that you provide a dated, written complaint to be turned in to HR, or if for any reason you are uncomfortable doing so, to any other management team member. Your complaint should include details of the incident or incidents, names of the individuals involved and names of any witnesses.

Any supervisor or manager who becomes aware of possible sexual or other unlawful harassment, discrimination or retaliation must immediately notify HR. **Any reporting of sexual harassment and discrimination will be handled in strict confidence by HR and management**

Conflict of Interest

Planview expects you to behave ethically as a matter of course, but even the most conscientious employee may, from time to time need to be particularly alert to avoid becoming involved in a situation in which his / her own interests' conflict with those of Planview.

The purpose of this statement of policy is to avoid a breach of the trust that Planview places in its employees.

As with any statement of policy, the exercise of judgement is required in determining its applicability to each individual situation. Some examples of the policy's applicability are given below but it should be remembered that these are simply examples and are not intended to be exhaustive.

Conflict of Interest

A conflict of interest arises when an employee profits through misuse of his / her position. It makes no difference whether this profit arises directly to the team member nor whether Planview is adversely affected by the situation. If, therefore, the potential beneficiary is a colleague, friend or relative, the conflict still exists. The profit may not be financial but could be special treatment of some kind.

Gifts

An employee who can influence a business transaction or decision between Planview and a third party, should not accept anything of substantial value from that party. If a gift does not compromise individual integrity or that of Planview and it is not of an unreasonably high value, then the team member should be allowed to receive it.

Examples of gifts to be declined are: Gifts of high value, lavish entertainment, loans of money or facilities, preferential investment opportunities, traded discounts, and reciprocal favours. Examples of acceptable gifts: Individual bottles of wine, chocolates, inexpensive lunch, limited occasion gifts (i.e., Christmas, Easter, Hanukkah).

Relationships at Work

Workplace relationships are common, given the amount of time that colleagues can spend together while at work. Employees are encouraged to socialize and develop professional relationships in the workplace provided that these relationships do not interfere with the work performance of either individual or with the effective functioning of the workplace. Employees who engage in personal relationships (including romantic and sexual relationships) should be aware of their professional responsibilities and will be responsible for assuring that the relationship does not raise concerns about favouritism, bias, ethics, and conflict of interest.

Romantic or sexual relationships between employees where one individual has influence or control over the other's conditions of employment are inappropriate and can cause a conflict of interest. These relationships, even if consensual, may ultimately result in conflict or difficulties in the workplace. If such a relationship currently exists or develops, it must be disclosed to HR immediately. It is the employee who has influence or control over the other's conditions of employment that has an obligation to disclose his/her relationship to HR.

Family Member: - in situations where one family member has direct influence over the other's conditions of employment (i.e., salary, hours worked, etc.) a conflict of interest is in place. For the purpose of this policy, family members are defined as spouse, domestic partner, daughter, son, parent, grandparent, grandchild, sister, brother, mother-in-law, or father-in-law. In some cases, a concern over conflict of interest may arise involving other close relatives - such as aunts, uncles, cousins, or relatives by marriage. In any case, when employees are unsure about a potential conflict, they should fully disclose the circumstances to HR, so a full assessment can be made.

Outside Business Interests

Frequent conflicts of interest arise in circumstances where an employee has a personal or family interest in another business.

By working for Planview, skills, knowledge and influence are acquired that are of value both to the team member and the Company. Conflict can arise in the following situations: Part-time work or freelancing for another employer, personal business transactions with the Company's suppliers, a close relative or partner in a related or neighbouring business.

The commitment required will be that the employee will not represent themselves to have any connection with Planview; will not use the Company's reserves e.g., equipment or time; will not deal with Company suppliers. If you propose taking up employment with an employer other than a company within Planview, or pursuing separate business interests, you must discuss this proposal with your immediate manager, to establish the likely impact of these activities on both yourself and Planview.

You will be asked to give full details of the proposed work and consideration will be given to:

- Working hours
- Competition, reputation, and credibility
- Health, safety, and welfare

You will be notified in writing of Planview's decision. Planview may refuse to consent to your request. If you work without consent this could result in termination of your contract of employment. If you are unhappy with the decision, you may appeal, using the grievance procedure.

In summary, an employee MUST NOT, by making any investment, by engaging in any activity, by creating any relationship with others or by accepting any gifts or other benefits, PUT HIM / HERSELF IN A POSITION IN WHICH HE / SHE MAY BE TEMPTED TO ACT FOR THE BENEFIT OF HIM / HERSELF OR OTHERS IN SOME DEGREE, RATHER THAN SOLELY FOR THE BENEFIT OF PLANVIEW. Any confidential information of Planview must be kept confidential and must be used solely for the benefit of Planview.

Anti-Bribery & Corruption Policy

In support of Planview's commitment to maintaining the highest possible standards of business practice the Company stance on bribery is one of 'zero-tolerance'. Bribery is illegal and as such has no place in our organisation.

In accordance with legal and ethical requirements Planview prohibits the following:

- The offering, the giving, the solicitation, or the acceptance of any bribe, whether cash or other inducement, regardless of size;
- To or from any person or company, wherever they are situated and whether they are a public official or body or private person or company;
- By any individual employee, agent or other person or body acting on Planview's behalf;
- To gain any commercial, contractual, or regulatory advantage for Planview in a way which is illegal/unethical;
- Or to gain any personal advantage, pecuniary or otherwise, for the individual or anyone connected with the individual.
- This prohibition includes facilitation payments made to public officials for securing or accelerating routine processes and procedures.

It is not the intention of the policy to prevent the following activities:

- Normal and appropriate hospitality.
- The giving and receiving of ceremonial gifts.
- Such hospitality or gifts must be in moderation and not place any expectation on the recipient to reciprocate either in like or by performing, or failing to perform, any other task in return.

If there is any doubt as to whether an action might constitute bribery the matter should be referred to HR for a decision.

All Planview staff have a responsibility to prevent, detect and report bribery. Relevant guidance will be available to support all staff in fulfilling this duty. Any suspicion of bribery or attempted bribery committed by or against an employee, agent or other party acting on behalf of Planview must be reported immediately to HR.

Foreign Corrupt Practices Act

The FCPA prohibits bribes to foreign officials for the purpose of obtaining or retaining business. Generally, a violation of the U.S. bribery laws occurs when a payment, or offer of payment, is made to a foreign official for the purpose of influencing an official act or to assist the company with obtaining business or securing an improper advantage. Payments do not need to be monetary in order to be considered improper. Any transfer of "something of value" to the foreign official can be considered an illegal bribe.

In addition to prohibiting bribery, the FCPA requires companies that list securities in the United States to maintain accurate books and records. In general, the FCPA makes it unlawful for (1) U.S. Corporations to bribe foreign government officials and (2) foreign corporation and persons, directly or through agents, an act of furtherance of the corrupt payment to take place in the United States and its territories. Companies whose securities are listed in the United States must keep books that accurately and fairly reflect the transactions of the corporation and maintain a system of adequate internal accounting controls.

Whistleblowing

Planview is committed to providing a workplace conducive to open discussion of our business practices and is committed to complying with the laws and regulations to which we are subject. Accordingly, Planview will not tolerate conduct that is in violation of such laws and regulations. Each Planview employee (and any other interested third party, such as a vendor, consumer, or competitor) is encouraged to promptly report a good faith complaint regarding accounting or auditing matters in accordance with the provisions of this policy.

To facilitate the reporting of complaints regarding accounting or auditing matters, the Audit Committee of our Board of Directors (the "Audit Committee") has appointed a Compliance Team who is responsible for receiving, reviewing, and investigating (under the direction and oversight of the Audit Committee) complaints under this policy.

Anonymous incident reports can be logged using **Convercent** at <https://app.convercent.com/en-US/LandingPage/296aec18-6e5f-ec11-a985-000d3ab9f296>. The Audit Committee has also established the following procedures for (i) the receipt, retention, and treatment of complaints regarding accounting, internal accounting controls, or auditing matters ("Accounting Matters") and (ii) the confidential, anonymous submission by Company employees of concerns regarding questionable accounting or auditing matters.

Scope of Accounting Matters Covered by Policy

This policy covers complaints relating to Accounting Matters, including, without limitation, the following actions:

- fraud or deliberate error in the preparation, evaluation, review, or audit of any financial statement of the Company;
- fraud or deliberate error in the recording and maintaining of financial records of the Company;
- deficiencies in, or noncompliance with, the Company's internal accounting controls;
- misrepresentation or false statement to or by a senior officer or accountant regarding a matter contained in the financial records, financial reports, or audit reports of the Company; or
- deviation from full and fair reporting of the Company's financial condition.

Method of Reporting Complaints

Employees may securely report complaints regarding Accounting Matters by e-mailing our Whistle-blower alias Whistleblower@planview.com. The complaint procedure is specifically designed so that employees have a mechanism that allows the employee to bypass a supervisor he or she believes is engaged in prohibited conduct under this policy.

Policy for Receiving and Investigating Complaints

All complaints are sent to both the Compliance Team and the Audit Committee Chair. Upon receipt of a complaint, the Compliance Team and the Audit Committee Chair will determine whether the information alleged in the complaint pertains to an Accounting Matter. The Audit Committee shall be notified promptly of all complaints determined to pertain to an Accounting Matter and shall assess the planned course of action with respect to the complaint, including determining that an adequate basis exists for commencing an investigation. The Compliance Team will then appoint one or more internal and/or external investigators to promptly and fully investigate each viable claim under the direction and oversight of the Audit Committee or such other persons as the Audit Committee determines to be appropriate under the circumstances. Confidentiality of the employee submitting the complaint will be consistent with the need to conduct an adequate investigation. During any investigation, the Company may find it necessary to share information with others on a 'need to know' basis. If the investigation confirms that a violation has occurred, the Company will promptly take appropriate corrective action with respect to the persons involved, including discipline up to and including termination and will also take appropriate steps to correct and remedy any violation.

Retention of Complaints

The Compliance Team will maintain records of all complaints, tracking their receipt, investigation and resolution and shall prepare a periodic summary report thereof for each member of the Audit Committee. Each member of the Audit Committee and, at the discretion of the Compliance Team, other personnel involved in the investigation of complaints, shall have access to the records. Copies of the records and all documents obtained or created in connection with any investigation will be maintained in accordance with our document retention policy. Personal data subject to a whistle-blowing complaints matter may not be stored for more than 2 years after the matter has been completed/closed.

Substance Abuse

The company is committed to ensuring your welfare and to safeguard Planview's efficiency and reputation. We consider alcoholism and drug dependency as illnesses which, except where necessary, should be treated medically rather than within the disciplinary procedures. The policy aims to encourage those employees with an alcohol or drug problem to seek appropriate help as early as possible. The Policy will:

- Ensure employees are aware of the risks associated with the abuse of alcohol and drugs
- Help managers to identify a drinking or drugs problem at an early stage
- Ensure that other employees are not put at risk or adversely affected by an employee's alcohol consumption or drug use

The definition of 'substance' includes the following:

- Alcohol
- Illicit, prescription or over-the-counter drugs
- Illegal narcotics
- Any other substance which may impair an employee's performance or conduct at work

This policy applies to all employees, and contractors with Planview. Consumption of alcohol is strictly forbidden on company premises unless for a specific in-house function. Consumption of alcohol is discouraged during lunch breaks – unless for a specific special occasion – such as a leaver's farewell. If you drink off-duty, it should be to an extent that it does not impair work performance or conduct. Drug use is strictly forbidden on company premises.

Planview has a duty of care towards all of its employees and there may be circumstances when an alcohol / drugs test may be requested. Any member of staff whose work performance or conduct is adversely affected by alcohol or drugs may be subject to action under our disciplinary procedures.

We encourage you to seek help if you have an alcohol or drugs-related problem and to seek advice on the assistance available.

There are often signs that might suggest that someone has a problem. These include a decline in work performance; a poor attendance record; unreliability; unexplained injuries; and changes in behaviour such as irritability and lack of concentration. Planview accepts that raising the subject may put you in a difficult or embarrassing position but believes that you should encourage a colleague to seek assistance.

If a manager observes that someone has a dependence problem, or information comes to light through the disciplinary procedure or by other means, the manager should encourage them to seek help. If managers require assistance, they should speak to the HR.

Counselling

If you are experiencing problems with alcohol or drug dependency, you are urged to seek support via counseling services available through your medical insurances.

Although Planview's intention is to help employees with substance abuse problems, we will take disciplinary action, including dismissal, for the following serious offences:

- Possessing, using, or selling illicit drugs on Company premises, the premises of a client organisation and at any other event when representing Planview.
- Working under the influence of alcohol such as to impair performance or conduct; drinking alcohol on Planview or client premises other than when authorised by management.
- Being under the influence of alcohol, drugs or other prescribed substances which impair performance or conduct whilst at work (including attending any event, whether social or otherwise at Planview premises or elsewhere).

If an employee refuses to accept referral to specialist help, we may initiate disciplinary action.

If you relapse after treatment has been completed, you will be given the opportunity to take further treatment. If this help is refused or your performance or action is unacceptable, disciplinary action will be taken.

Grievance Procedures

Good employee relations are an essential part of a positive working environment, however in any work situation there will be occasions when you will have a complaint or problem that you feel requires attention. It is important, therefore, that both informal and formal communications exist and that all legitimate complaints and concerns are dealt with as promptly as possible. Planview feels that it is important that there is a procedure in place that can quickly resolve these issues. All investigations will be recorded in writing.

Standard Grievance Procedure – Three Key Steps	
Step 1	a) Initially raise your grievance in writing with your manager. You should state the basis of your complaint. Your manager will investigate and respond in writing within 7 days.
	b) If you wish the matter to be further investigated you will be invited to a meeting where your grievance will be discussed with you. You should take all reasonable steps to attend that meeting. Serious consideration will be given to the matter, attempting to reach a fair settlement to you, other individuals, and the Company.
	c) After the meeting you will be informed of the outcome and offered the right to appeal.
Step 2	If you are not satisfied with the solutions offered, you may appeal in writing within seven days of the decision, to the person at the next level above your immediate manager. You will be invited to a second meeting where your appeal will be discussed. A recommendation will be made and communicated to all parties concerned.
Final Step	Where a matter cannot be resolved at Step 2, you should appeal in writing within seven days of the decision, to the person at the next level above. Once again you will be invited to a meeting and your appeal discussed. A final recommendation will be made and communicated to all parties.

Please note:

- This grievance procedure is available for all employees other than those who are outside the agreed time limits.
- The purpose of the grievance procedure set out is to provide a means for dealing promptly with any grievance, which an employee may have in the course of, and connected with, his or her employment.
- If an appropriate manager within the specified time limit does not deal with a grievance, the employee shall have the right to proceed to the next stage of the procedure.
- Where an employee fails to comply with a time limit the procedure will cease and the grievance will be considered settled or withdrawn, unless it is agreed that the failure was not the fault of the employee.
- If, however, an employee's immediate manager is the subject of the grievance and for this reason the employee does not wish the grievance to be heard by him or her, the employee shall have the right to have the grievance heard by a Director or VP of Planview. The person hearing the grievance shall provide the employee's immediate superior with an opportunity to express his or her views about the matter without obligation to do so in the presence of the aggrieved employee.
- Good employee relations are an essential part of a positive working environment, however at certain times an employee may feel that they have an issue relating to an aspect of performance or working life that requires specific attention.
- It is encouraged that any grievance should in the first instance be raised with the employee's manager. The intention is that at this stage any problem can be resolved in an informal manner. However, if the matter is not resolved, the individual should speak to the HRBP who will then initiate the formal grievance procedure.

Remote Working

Home based employees are defined as employees whose agreed normal place of work is their home address. The offer of employment letter / contract of employment must stipulate the employees home address as their place of work.

Homeworking Assessment

A homeworking ergonomic assessment must be completed at the commencement of a home working agreement:

Regular assessments may be required to be completed thereafter and in line with Health and Safety legislation and our Health and Safety policy and procedures. Training will be provided to you as necessary in order that you can undertake such assessments. Remedial action will be taken promptly where appropriate.

If you are home-based, you should ensure you are familiar with the company's Health and Safety Policy and Procedures and should advise your manager immediately if you become aware of any issues relating to your own health and safety whilst working from home.

Communication

The following communication methods will be used to keep home based employees informed of issues affecting them and the business:

- Inclusion in all staff email groupings.
- Remote access to the company network with regular check-ins with your manager.
- Invitation to team meetings.
- Regular 1-2-1's and check ins.

You are encouraged to bring to your manager's attention any instances where you feel you have not been kept informed either generally or regarding a specific subject or situation.

Equipment

Any requirements must be requested through your manager and approved by Corporate IT. All requests must comply with the IT Hardware policy. Expenses incurred for reasonable office supplies will be reimbursed. Any other home office purchases must be approved in advance by your manager and Corporate IT.

Insurance

Items of equipment belonging to the company will be covered by the company's insurance arrangements i.e., equipment securely stored in an individual's home.

Working from home may affect your home and contents insurance policies. The company will not accept liability for damage caused to the home or its contents. You must inform and make any necessary arrangements with your insurers before commencing home working. Mortgage and Tenancy Agreements - Employees working at or from home on a regular basis must inform anyone with an interest in the property e.g., their building society, bank, or landlord.

Other Terms and Conditions

The contents of the Employee Handbook apply to home-based employees in all respects unless otherwise advised.

Home based employees should be contactable always between their normal working hours each working day unless otherwise agreed in their contract of employment.

Environmental Policy

Planview Inc. is a developer, distributor and installer of Enterprise, Project, and Service Management Information Software. Our principle activities include the distribution and implementation of Software and related, office based, administration. Our principle environmental impact comes from administrative activity and the need for our Sales and Implementation workforce to travel extensively and perform their work duties on client and prospective client sites.

Planview is committed to the protection of the environment; minimising the impact as a company we have on it, and where possible, improving it for our employees, clients, and the public. As a non-manufacturing, information technology company we do not have as severe an effect on environment as many industrial activities, nonetheless we recognise that all activities carry environmental consequences and therefore we aim to:

- Identify, reduce and where reasonably practicable eliminate any adverse impact on the environment arising from the activities of our business.
- Minimise the use of energy resources consumed, and waste produced while undertaking our business activities in a safe and professional manner.
- Support the re-use and recycling of materials and ensure the safe and legal disposal of all waste arising from the activities of the business.
- Comply with and wherever possible exceed the environmental requirements of appropriate legislative bodies and our customers.
- Inform and train our staff in understanding and fulfilling their environmental responsibilities and those of the company.
- Establish and measure environmental performance against objectives and/or targets.
- Continually improve our environmental performance.

Waste Minimisation

The majority of Planview waste is left-over promotional material and paper from administrative tasks. In our head office and in the home offices of our employees Planview will:

- Wherever possible, purchase promotional and office material made from recycled products.
- Only order materials in quantities sufficient for purpose to eliminate over-supply.
- Recycle paper, aluminium, cardboard, plastics, and bottles in association with the serviced office provider and local authority.
- Recycle print cartridges.

Safe and healthy environment for employees

Planview acknowledges the fact that our employees spend most of their lives in a work environment. In recognition of this Planview commits to:

- A totally non-smoking environment.
- Strict adherence to Health and Safety legislation and the Planview Health and Safety policy.
- Encouragement of exercise and a healthy lifestyle.
- Provision in the Planview head office of a pleasant, well-lit, and ventilated work environment that encourages a sense of wellbeing.
- Completion of risk assessments for employees.

Transport

Planview employees travel extensively during their employment. In recognition of this Planview encourages the following:

- Where practicable and cost effective the use of public transport rather than private vehicles.
- The sharing of private vehicles and taxi cabs when travelling to the same destination as colleagues.
- Elimination of unnecessary journeys when the same result can be achieved by other means of communication such as telephone and video conferencing.

Leaving

Notice of Termination (US Employees Only)

If you are based in the US your employment is "at will", meaning that no one has a contractual right, express or implied, to remain in Planview's employ. Planview or an employee may end employment, without cause, and without notice, at any time for any reason. However, when an employee decides to leave, it is requested that the employee provide the Company with a written two-week minimum advance notice, excluding the use of paid time off (PTO). In certain circumstances, the employee may be required to leave immediately upon notice. All resignations should include written notification to an employee's immediate manager and HR.

- Resignation: Voluntary employment termination initiated by an employee.
- Discharge: Involuntary employment termination initiated by the company.
- Layoff: Involuntary employment termination initiated by the company usually for non-disciplinary reasons.

Notice of Termination (All Countries Except US)

All employees are subject to the notice periods as specifically stated in the Contract of Employment. If you wish to resign you must do so in writing to your manager stating the amount of notice being given and the date, you wish to leave. The resignation will be acknowledged in writing by HR confirming the leave date.

The Company reserves the right, upon giving or being given notice that you leave your employment forthwith, whereupon the Company will make payment in lieu of notice. During any period of notice the Company is under no obligation to provide you with work and may, subject of course to continuing to pay your salary and providing you with the other benefits due under your contract, require you to stay at home and do no work either for the Company or for anyone else.

Return of Company Property

Upon termination of your employment for any reason, you will be required to return any Company property within your possession or control by the end of your final day worked at the exit interview, or upon any earlier request by the Company. Company property includes but is not limited to: Company files, notes, memoranda, correspondence, agreements, draft documents, notebooks, logs, drawings, records, plans, proposals, reports, forecasts, financial information, sales and marketing information, research and development information, personnel information, specifications, computer-recorded information, tangible property and equipment (including but not limited to laptops, PCs, cell phones, and PDAs), credit cards, entry cards, identification badges and keys, and any materials of any kind that contain or embody any proprietary or confidential information of the Company (and all reproductions thereof in whole or in part). You must make a diligent search to locate any such documents, property, and information. In addition, if you have used any non-Company computer, server, or e-mail system to receive, store, review, prepare or transmit any Company confidential or proprietary data, materials, or information, you must provide the Company with a computer-useable copy of such information and then permanently delete and expunge such Company confidential or proprietary information from those systems

Exit Interview

In the interests of evaluation and continuous improvement, before an employee leaves Planview they will be invited to complete an exit interview with HR. The purpose of this is to identify the reasons why the employee is leaving and to improve the working conditions of other employees. The exit interview is confidential.

Employment References

All requests for references and employment verification should be sent to HR Ops via the HR ticketing process. Where it is a legal obligation Planview will provide an employment confirmation letter. The Company reserves the right not to give references outside of this but where it does, the company will respond in writing, and provide general information only concerning the employee such as date of hire, date of termination, and positions held.

Performance Improvement & Management

Performance Management

Planview works actively to ensure that all employees have the skills required to perform their jobs. All employees have the right to, and responsibility for, continual development in their roles. Here at Planview we love growth and that includes people that grow. We believe that continually developing our employees is crucial to success and for this reason all managers are expected to have a structured plan in place for employee growth and development.

Every employee should be having regular review meetings with their manager. The purpose of these meetings is to review performance and to discuss training objectives and other information relevant to the individual and the job that they perform. This discussion will also allow for the setting of actions and objectives that will be followed up on a regular basis. The frequency of these meetings will be dependent on role.

The review meeting is in no way connected with the review of salary and any discussions regarding salary will take place on a different occasion to that of the appraisal meeting.

Performance Improvement

Planview recognises that its employees are its most important asset and is committed to ensuring that everyone has the appropriate skills, knowledge, competence, and aptitude to undertake their role effectively.

Anyone performing below the level expected in their role will have a detrimental effect on service and the business. It is therefore the responsibility of management to bring this to the attention of the individual and to work closely with them to improve performance to an acceptable level. Throughout the process both parties will work co-operatively in identifying issues, planning required action, and evaluating the outcome of any such action. The focus of this process is on support for the individual to ensure meaningful and sustained improvements in performance.

Where under performance is identified and action is required it is important that an agreed process is followed. This process will:

- Ensure that a fair and reasonable process exists where an employee is experiencing performance difficulties
- Ensure that the cases of poor performance are handled appropriately with any underlying reasons identified and considered
- Ensure that employees are offered support and appropriate training within a performance review framework.

Definition of Capability

For this policy and procedure, capability to perform is assessed with reference to skill, aptitude, competence, knowledge, and ability. Examples of this may include adequacy of skills, professional insight, and ability to cope with reasonable workloads, ability to meet identified standards and ability to prioritise appropriately. Incapacity due to ill health is dealt with under the company's absence procedures.

Where an individual, for whatever reason, experiences an inability to meet the requirements of the role, this performance improvement procedure should be followed.

The objective should always be to establish a constructive method of achieving improved work performance through effective supervision, mentoring, support and training, and performance review and development.

It is essential that all employees are aware of the performance and standards of work expected of them and the range of duties to be undertaken.

A record of discussions and agreed actions and if applicable, warnings, must be retained.

Stage 1: Informal Warning [Informal Notice of Improvement]

Where employees are experiencing difficulties with performance, the problem should be addressed in an informal meeting at the point at which it first becomes apparent.

Stage 2: Formal Warning [1st Notice of Improvement]

This meeting can be part of the appraisal cycle, or a meeting arranged specifically for formal action. Employees will have the right to be accompanied.

Stage 3: Final Warning [Final Notice of Improvement]

If following the end of the review period agreed in Stage 2, there has been no discernible, sufficient and/or sustained improvement in performance and there is clear evidence of this, a meeting should be called at Stage 3.

Stage 4: Formal Action [Dismissal]

If the employee's performance still fails to improve sufficiently, a capability hearing will be arranged to consider dismissal on the grounds of capability.

Right to Appeal

Following any stage of disciplinary procedure, an employee has the right to appeal against the decision. The appeal must be in writing, stating the grounds of the appeal and must be sent to the nominated Appeal manager. The appeal must be received within 5 working days upon receipt of the written decision.

Probation Period (All Countries Except Israel & US)

During any initial period of employment for new employees (normally six months or as stated in the Contract of Employment) special rules relating to the Disciplinary Procedure apply. During this period the Company reserves the right to waive some, or all of the official warnings described in the Disciplinary Procedures and may terminate an employment contract without any formal warnings at our discretion.

Prior to any dismissal, the Company will set out in writing the grounds for such action. Employees will be given the opportunity to consider their response to this and invited to a meeting, at which they will have the right to be accompanied. They will also be given the right of appeal against any decision made as a result of that meeting and they will have the right to be accompanied at any appeal meeting.

Disciplinary Procedures

It is recognised by Planview that discipline is necessary for the efficient operation of the business and is essential for the promotion of fairness and consistent treatment of all employees. In order to provide fair and effective procedures for dealing with disciplinary matters, the following procedure will be applied where disciplinary action is warranted, other than an informal reprimand for minor acts of misconduct.

In the first instance, Planview will seek to correct an employee's poor performance or behaviour through informal counselling. Informal counselling may take place one to one or in group meetings depending on the nature of the problem.

The formal disciplinary process will only be applied when informal counselling has been unsuccessful or when the actions of the employee are such that informal counselling is inappropriate. Planview accepts that no employee will be formally disciplined without a fair hearing and the opportunity to put forward his or her case. Whilst it is hoped that such a procedure will prove unnecessary, it must be recognised that incidents requiring a formal response will occur. The dismissal and disciplinary procedures ensure that all employees are treated fairly and consistently during this process.

This procedure does not apply to the termination of a fixed term contract, casual staff or the termination following the end of a probationary period.

Suspension

If the matter to be investigated is thought to involve serious misconduct, the employee may be immediately suspended from work while the investigation proceeds. Any decision to suspend will be confirmed in writing as soon as reasonably practicable, and this will be a precautionary suspension, pending the outcome of the investigation.

Investigation

Where a matter arises, which is suspected or believed to contravene a policy or procedure or may otherwise be a disciplinary matter, Planview will investigate it promptly and adequately. When the investigation is concluded, the employee will be informed, either orally or in writing.

Disciplinary Action

In all cases, other than those involving gross misconduct disciplinary action may be taken:

- For minor offences, a formal verbal warning will be given.
- For more serious offences or the repeat of a minor offence a written warning will be issued.
- For a serious offence or a minor offence committed whilst a written warning is active a final written warning will be issued.
- Where cases of gross misconduct are alleged, and it is established on the balance of probabilities, the employee will be liable to summary dismissal at which point no notice payment will be made.
- In cases of gross misconduct whereby the employee is not summary dismissed, but is either demoted with a lesser salary, or any other penalty it will be accompanied by a Final Written Warning.

Appeal

Following any stage of disciplinary procedure, an employee has the right to appeal against the decision. The appeal must be in writing, stating the grounds of the appeal and must be sent to the nominated Appeal Manager. The appeal must be received within 5 working days upon receipt of the written decision.

Gross Misconduct

If you are accused of an act of gross misconduct, you may be suspended from work on full pay, normally for no more than 5 days working days, while the company investigates the alleged offence.

If, on completion of the investigation and a full disciplinary hearing, the company is satisfied that gross misconduct has occurred, the result will normally be summary dismissal without notice or payment in lieu of notice. You will have the right of appeal.

Planview views the following as gross misconduct – such matters are by way of example and this list is not exhaustive: -

- Acts of theft, fraud and other dishonesty whether committed in the course of the employee's duties or not.
- Unauthorised removal, destruction or possession of property belonging to Planview its clients or any authorised person with whom the company has dealings.
- Undertaking work in a private capacity which is in any way in competition with Planview's range of services whether such work is remunerated or not.
- Breach of professional confidence or disclosure of confidential information including security incidents.
- Any form of Bullying or Harassment.
- Violent, wilful, or reckless behaviour which does, or could result in damage to the person or the property of Planview, its employees, clients, or other persons with whom it has dealings.
- Possession of, or being under the influence of, alcohol or drugs on Planview premises save for any drugs prescribed by a qualified medical practitioner.
- Acts of indecency, sexual harassment, or other similar misconduct with or towards another employee, client, or person with whom Planview has dealings.
- Persistent or unexplained absence from work.
- Use of threatening, abusive or insulting language to other employees, clients, or persons with whom Planview has dealings.
- Breach of the Planview Equal Opportunities Policy.
- Breach of the Planview Health and Safety Policy.
- Deliberate falsification of records, including expense claims.
- Misuse of Company assets, funds, or name.
- Failure to disclose any criminal conviction not exempted.
- Bringing Planview into disrepute with actions which are likely to result in damage to Planview's image or reputation in the community or to the employee's image or reputation. Including defamation of the Company via the Internet / Social Media.
- Acceptance of any bribe, secret profit, or unauthorised commission.
- Refusal by the employee to carry out a lawful instruction.
- Serious acts of insubordination.
- Serious neglect of the employee's duties resulting in actual or likely loss, damage, or injury.
- Repeated acts of less serious misconduct.

Less Serious Misconduct

Some examples of less serious misconduct are listed below but again this list is not exhaustive:

- Absenteeism and poor timekeeping.
- Failure to notify Planview of absences and failure to supply a Medical Certificate when required.
- Time wasting during the course of one's duties.
- Failure to meet performance standards after every reasonable effort has been made by Planview to ensure all relevant training has been given to bring you to the required standard, and where the employee has already received counselling.
- Non-deliberate damage to the person or property or the Company, its employee's, clients, or other persons with whom the Company has dealings.
- Failure to follow clearly defined operating procedures, or failure to comply with a reasonable request from a manager.
- Insubordination.
- Negative behaviour towards colleagues or management, whether verbal or by actions.
- Excessive use of company phones and time for personal calls.
- Abuse of expenses and / or misuse of a Company Credit Card.

Health & Safety

General

It is the policy of Planview to establish, provide and maintain working conditions that are safe, healthy and conform to appropriate safe systems of work for all employees. Every employee is responsible for their own health and safety as well as that of their colleagues. Should an employee disregard the safety regulations they may be liable for disciplinary action.

It is important that all employees are aware of the health and safety implications of all procedures and practices. The following matters fall within this category although it should be assumed that there might be others arising from time to time.

- The correct use, handling and storage of articles, materials, food, liquids, and gases.
- The avoidance of wet floors.
- The correct use of electrical items.
- Following the smoking and tobacco policy.
- Employees have a duty to co-operate with the employer in enforcing Health and Safety practices.

Failure to co-operate in such matters is regarded as gross misconduct and disciplinary action may be taken.

Employees must also carry out any necessary duty, which the law requires and cooperate with Planview to allow legal obligations to be met. Anything provided for health and safety purposes must be used properly and not misused. Any employee discovering a health and safety problem, which they cannot correct must inform their manager / HR. Our employees' contribution is essential in achieving a safe and healthy work environment.

Planview will take all reasonable steps to:

- Provide adequate control of the health and safety risks arising from our work activities
- Consult with our employees on matters affecting their health and safety
- Prevent accidents and cases of work-related ill health
- Maintain safe and healthy working conditions
- Review and revise the policy at regular intervals.

Work Environment

A good and safe work environment is an important part of everyday work life at Planview. The aim of the Planview work environment effort is to create a physically, psychologically, and socially sound and rewarding workplaces for all employees, where the risk of work-related injury or ill health is prevented.

Planview assesses its work environment policy on an ongoing basis, to enable continuous improvements in daily work environment tasks. Duties should be adapted to people's circumstances both in the physical and psychological sense. Measures which improve the work environment have positive effects both on the individual and on the organisation.

The task to create a good work environment requires a lot both from the organisation and the individual. It needs to be carried out collectively and everyone must take part. Measures to change the work environment need to be characterised by a comprehensive view of all the factors that affect people at work. Assessing and developing the work environment should comprise a natural part of all activity within the business. Employees should be aware not only of what risks there are, but also of how to avoid those risks.

Work environment problems should, as a rule, be resolved within the workplace by continuous and close collaboration between the business and its employees.

Responsibilities

The employer has the main responsibility for the work environment. Therefore, it is Planview who must take the measures required to prevent risks of ill health and injury and otherwise create a good work environment. Each office location has an Office Manager who has responsibility for the work environment and must ensure that responsibilities and duties are divided within the organisation in such a way that work environment tasks can be carried out effectively. All staff have a work environment responsibility by e.g., following safety regulations and report to their manager and HR any risks or deficiencies within their work environment.

Aim

The overall aim of the work environment policy is to achieve a durably effective operation which promotes physical and psychological health, job satisfaction and fulfilment for all employees, while also ensuring the prevention of accidents at their place of work.

Guidelines

To achieve a work environment which is consistent with our aim it is necessary that:

- No member of staff is subjected to victimisation such as bullying, physical violence, social exclusion, or harassment.
- No member of staff is under the influence of alcohol or drugs during working hours. All employees must, if someone is under the influence of alcohol or drugs, immediately report this to their manager and HR, who must ensure that appropriate measures are taken.
- Job redesign and rehabilitation matters are an integral part of the work environment effort. The aim is to enable the employee to get back to work as soon as possible. If required, external experts are consulted.
- All employees are given the knowledge, skills, and practical means necessary to actively participate in the structuring of their work.
- Individuals are, as far as is possible, assigned rewarding and stimulating tasks with opportunity for change and variation, and given responsibilities according to ability.
- Responsibilities and duties are clearly expressed and well known.
- Both internal and external resources are used to identify and assess risks and to propose actions.
- Tangible work environment programmes and projects are initiated, implemented, and evaluated.

As a business, promoting health and increasing our organisation's ability to counteract ill health is a priority. All managers should have a 1-2-1 meeting (face to face, Zoom / Teams) every second or third week and, with regular basis check with the employee:

1. Which work tasks they are to perform
2. Which results are to be achieved with the work?
3. Whether there are methods with which the work is to be performed, and if so, how;
4. Which work tasks are to be prioritized when available time is not enough for all work tasks to be performed; and
5. To whom they can turn to receive help and support in carrying out the work.
6. The employer shall, in addition, ensure that the employees know what authority they have according to points 1-5.

Through continually reviewing points 1-5, it will be possible to prevent unnecessary demands and burdens on the employees.

Ergonomics and Work environment

For our physical office locations Planview will use the occupational health services of a consultant to offer all employees an ergonomics assessment once a year and work environment inspections every second year. The inspections handle a general office inspection, lights at the office, ventilation, and acoustics/disturbing noise.

Work Equipment

Planview will ensure that all work equipment, including lifting equipment, is maintained in an efficient state, in efficient working order and in good repair.

We will ensure office-based mains electrical installations are certified by a qualified electrician and portable electrical equipment is uniquely marked, identifiable and regularly tested. You should ensure that:

- Damaged equipment, electric cords and plugs are not used
- Electric outlets are not overloaded with too many plugs
- Water is not spilled on any electrical equipment
- All cables are safely routed with no trailing wires.
- If you are aware of any faulty equipment, this must be reported.

Sight Tests

Please liaise with your HR Business Partner to see if an eye exam is included in the health care coverage in the country you are located.

Homeworking

If arrangements are made for you to work from home, then the area of your home in which you work must be subject to a workstation risk assessment

Any equipment supplied by us will be subject to the same checks and maintenance as 'office based' equipment.

Wellbeing

As an employer, Planview seeks to create and maintain a working environment that promotes the health and wellbeing of all its employees.

During our working lives, we will all experience times when work and/or personal life is challenging. A certain amount of pressure can be healthy, however should you be experiencing difficulties in your work, you should in the first instance speak to your manager / HR.

This will provide you with an opportunity to discuss your issues, whether they are because of work pressures or pressures outside of work and how they may be affecting your work. Through such discussions it is anticipated that ways of resolving the situation will be identified and an independent person can be asked to facilitate this if required.

Our responsibilities for protecting employees from the health and safety risks at work apply to both physical and mental illness. We recognise that stress can cause changes in behaviour and personality and can affect your performance at work. If you have any concerns in this area, you should bring them to our attention as soon as possible.

Stress can build up slowly and can be brought about by a variety of causes including pressures at home or work or both. There are no unique symptoms, but stress may be indicated by sleeplessness, loss of appetite, repeated illnesses, and sudden feelings of panic or irritability with your family or friends. It may be caused by changes you think are beyond your control either at home or at work.

Any of these situations may require people to adjust. If this is not recognised or resisted, pressure can build up leading to problems or other diseases. Many people are reluctant to admit that they are suffering from stress, particularly to work colleagues but we are sympathetic to anyone in this position and would encourage staff to discuss the matter, particularly if it is work related. It is usually possible to resolve issues that are causing stress at work, and we would not want anyone suffering in silence.

Mobile Phone

To ensure the legal requirements of mobile phone usage are implemented whilst driving, the use of a mobile phone or other communication devices whilst driving a vehicle on company business is not encouraged. Phone users can accept incoming calls, on the understanding that they are using a recognised hands-free kit or device. For clarity this includes a total hands free permanently fitted car kit or a Bluetooth Device paired with the holder's phone. Devices attached directly to the phone are considered not to be hands free. The making of calls on company business or otherwise is actively discouraged. Drivers wishing to make calls are advised to stop in an appropriate safe place to park and make outgoing calls whilst stationary. To

avoid all elements of doubt and for clear information relating to the use of mobile phones, the regulations relating to the use of mobile phones and communication is:

Hand-held Phones: It is illegal to use a hand-held mobile phone while driving. It is also an offence to "cause or permit" a driver to use a hand-held mobile phone while driving.

Hands-free Phones: Drivers should be aware that where they use a hands-free phone while driving, depending upon the individual circumstances, they could be charged with 'failing to have proper control of their vehicle'. In more serious cases, the use of any type of mobile phone could result in prosecution for careless or dangerous driving. The Police may check phone records when investigating fatal and serious road traffic accidents to determine if use of the phone contributed to the accident.

Employees should bear in mind that whilst hands-free devices are safer than hand-held devices, both have an adverse effect on drivers' attention. Before using a hands-free device when driving a car, the employee should be confident that answering the call will not affect their own safety or that of other road users.

UNDER NO CIRCUMSTANCES SHOULD EMPLOYEES USE A HAND-HELD PHONE TO MAKE OR RECEIVE CALLS, SEND MESSAGES OR EMAIL WHILST DRIVING.

Version History

Version History

Version	Date	Author	Notes
1.2	2 nd January 2024	Chris Carsen	Addition of "Antitrust & Fair Competition" policy
1.1	30 th October 2023	Louise Norbury	Amended to Global and all policies updated
1.0	19 th October 2022	Louise Norbury	Initial document