



Familial and intimate personal relationships policy – Frequently asked questions

1. Policy Information

What is meant by “real or perceived authority or influence”?

The following are examples of having authority or influence over an employee, whether in fact or in perception:

- You have direct review or approval authority over the employee’s work including work allocation
- You have direct responsibility for or influence on the performance evaluation, performance rating, compensation, development plans, development opportunities, or promotions of the employee
- A formal coaching relationship exists between you and with the employee
- You are in a position to affect work assignments or client assignments of the employee, or
- You are in the position of approving transactions such as timesheets, expense reimbursement or overtime payments for the employee.

However, please note that the list above is not an exhaustive list. If you have any questions, reach out to Talent Services via MySupport (ServiceNow) using the [Familial and Intimate Personal Relationships Reporting](#) category.

What familial relationships are included in this policy?

Familial relationships covered by this policy include (but are not limited to) people related by blood, marriage, common-law or adoption as:

- Spouse/domestic partner/spousal equivalent
- Child or grandchild (including step-, or in-law)
- Sibling (including step-, half- or in-law)
- Parent or grandparent (including step-, or in-law)
- Cousin
- Aunt or uncle
- Niece or nephew

What do you mean by ‘intimate personal relationships’?

We are defining intimate personal relationships as consensual romantic and/or sexual involvement; an intimate personal relationship that goes beyond what would be considered a “typical” friendship between professional colleagues.

To whom does this policy apply?

This policy applies to relationships between:

- individuals working at Deloitte including practitioners and partners who are permanent employees, fixed term employees including students, contingent workers and individuals from member firms outside of Deloitte Canada; and
- relationships between practitioners and clients where the practitioner is serving the client or is on the account of the client organization

Scenarios

Can spouses and/or family members work in the same office?

Spouses and/or family members may work in the same office as long as one spouse or family member does NOT exert real or perceived authority or influence over the other spouse or family member or are in the same chain of command.

Can I refer a family member for a position at Deloitte?

You can refer family members for positions at Deloitte. Just be certain that the position you refer them for will NOT:

- Result in you having real or perceived authority or influence over the family member,
- Result in you being in the same chain of command as the family member, or
- Result in you having real or perceived influence over the hiring process.

Can I hire a family member of another employee?

You can hire a family member of another employee as long as the employee will NOT be in a position to exert real or perceived authority, have influence over the new hire, or be in the same chain of command.

We have family members (e.g., siblings) on the same team. Is that acceptable under the new policy?

Family members may be on the same team as long as they are not in the same chain of command and one family member is not in a position where they exert real or perceived authority or influence over the other family member. However, if an employee's role changes which results in the employee having real or perceived authority or influence over their family member, the relationship should be reported to Talent through MySupport (ServiceNow) using the [Familial and Intimate Personal Relationships Reporting](#) category at the onset of the change.

I'm currently dating someone on my engagement team. Does this policy affect that?

You may date someone on your engagement team as long as you are not within the same chain of command and do not have authority or influence over that person. However, if you are in a position of authority or influence over them or there is a change to either of your roles which results in having real or perceived authority or influence over them, you should report the relationship immediately to Talent using the [Familial and Intimate Personal Relationships Reporting](#) category in MySupport (ServiceNow). Talent will confidentially review the situation

with appropriate parties (e.g., Managing Partner, Talent Advisor) to determine if a conflict of interest exists.

2. Reporting the Relationship

I'm currently in a relationship that seems to contravene the policy. What should I do?

You should report your relationship to Talent through MySupport (ServiceNow) using the [Familial and Intimate Personal Relationships Reporting](#) category. Talent will confidentially review the situation with appropriate parties (e.g., Managing Partner, Talent Advisor) to determine if a conflict of interest exists.

I'm aware of a relationship that seems contrary to this policy. What should I do?

As noted in firm policy, those in the relationship are expected to report it accordingly. If you are aware of the relationship and believe that it may not have been reported or is not in accordance with policy, contact Talent Services by logging a ticket through MySupport (ServiceNow) using the [Talent Policies](#) category.

Do I need to report a familial or intimate personal relationship that involves someone at a client organization?

If you are a Deloitte practitioner who is serving the client or is on the account of the client organization, then you are required to disclose the relationship to the engagement partner.

Which individual in the relationship is responsible for reporting the relationship?

The individual in the more senior level role should report the relationship to Talent. However, it is the responsibility of both individuals involved in the relationship to ensure that the relationship is reported. Both individuals should discuss the requirement to report and if the senior level individual does not report the relationship, it is expected that the other individual in the relationship should report it.

If I report a relationship, who will have access to this information?

All disclosures will be kept confidential and information will only be shared with those who have a need to know. This may include but is not limited to the professional's Managing Partner and/or Talent Advisor. Information may be processed outside of Canada, will be kept secure at all times, and will only be retained for as long as required. Read this [Privacy Statement](#) for additional information on how Deloitte processes professionals' information.

What happens if I am in such a relationship but choose not to comply with this policy?

As with all policies, Firm members are expected to comply with fully. Failure of an individual to disclose a familial or intimate personal relationship as required, or failure to co-operate in a solution proposed by Deloitte may result in disciplinary action up to and including termination for cause.