

**Advice to the United Food and Commercial Workers Union, Local 401**

**Initial Recommendations for Safeway's Comprehensive  
Customer Abuse Policy**

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## **1.0 Purpose and Scope of this Report**

The United Food and Commercial Workers Union (UFCW), Local 401 has asked me to provide recommendations regarding the content and implementation of a comprehensive program to prevent and respond to incidents of customer abuse at unionized Safeway grocery stores in Alberta. I served as the union's expert witness during the related arbitration hearing in October 2025.

The proposed multifaceted program builds on Safeway's existing harassment and related policies (e.g., de-escalation protocol), and is intended to prevent employees in customer-facing roles from being exposed to customer abuse and improve the consistency and effectiveness of responses to such incidents.

My recommendations are informed by:

- Industry best-practice;
- Discussions with a number of frontline Safeway workers and UFCW union reps;
- Observations from a recent visit to three Edmonton-area Safeway stores;
- A review of Safeway's related on-line training modules;
- Provisions of the current collective bargaining agreement; and
- Relevant legislative requirements in Alberta.

In presenting these recommendations, I am also mindful of Michael Hughes' related arbitration award. Unless otherwise noted, the photos shown in this report were provided by a labour relations officer with UFCW, Local 401.

## **2.0 Safeway's Alberta Stores**

Safeway operates 67 stores in Alberta's competitive grocery sector. There are a variety of customer-facing roles in each store: cashier, in-store deli, bakery service, pharmacy technicians and florist department clerks.

Safeway has several competitive advantages: established, convenient store locations; a longstanding reputation for customer service; customer loyalty due to relationships formed with long-tenured employees; and a range of products appealing to different market segments.

The communities surrounding Safeway stores vary in terms of their socio-economic make-up, risk of property and violent crime, and general social disorder.

### **3.0 Legal Requirements**

Safeway's violence and harassment prevention program must be compliant with sections 390-391 of Alberta's OHS Code (Violence and Harassment, Part 27) and Article 20 of the Safeway-UFCW Local 401 collective bargaining agreement.

Section 390(1) of the Code states: "An employer must develop and implement a violence and harassment prevention plan" and prescribes a number of elements of a plan (e.g., provisions related to reporting and investigating incidents). Article 20, shown below, is additive as harassment is defined more broadly than it is in Alberta's OHS legislation, encompassing customer rudeness, impropriety and abuse. It also specifies that the program will be reviewed by the Union President.

#### Customer Complaints and Abuse

The Employer agrees there shall be zero tolerance for customer rudeness, impropriety and abuse. No employee shall be required to continue to serve a customer who has engaged in any of these behaviours.

Management shall take proactive steps to discourage improper behaviour through the development and implementation of an appropriate and comprehensive program within one hundred twenty (120) days. The program shall be reviewed with the Union President or designate(s).

It's noteworthy that the definitions of harassment and violence in Alberta's OHS Act refer to related actions by a "person" – in other words, the Code does not differentiate between harassment perpetrated by a customer, co-worker, manager or other person. Furthermore, Part 27 of the Code requires that all complaints and incidents of violence and harassment be investigated and corrective action be taken. Here also, the perpetrator is not specified. Given this, employers' obligations regarding prevention of harassment and violence are equally applicable to customer-initiated conduct against employees and employee-initiated conduct against another employee.

### **4.0 Employer Approaches to Customer Abuse: Prevention is Key**

Societal incivility increased significantly during the COVID-19 pandemic and remains an issue to this day for many service-oriented organizations.

Organizational responses to customer abuse are informed by different beliefs about the problem. For example, some employers believe the issue is too large for any one organization to address, while others are hesitant that setting expectations for customer behaviour will negatively impact sales. These beliefs can lead organizations to rely more on reactive approaches (i.e., responding *after* a serious incident of harassment or violence) with less emphasis on proactive, preventative measures.

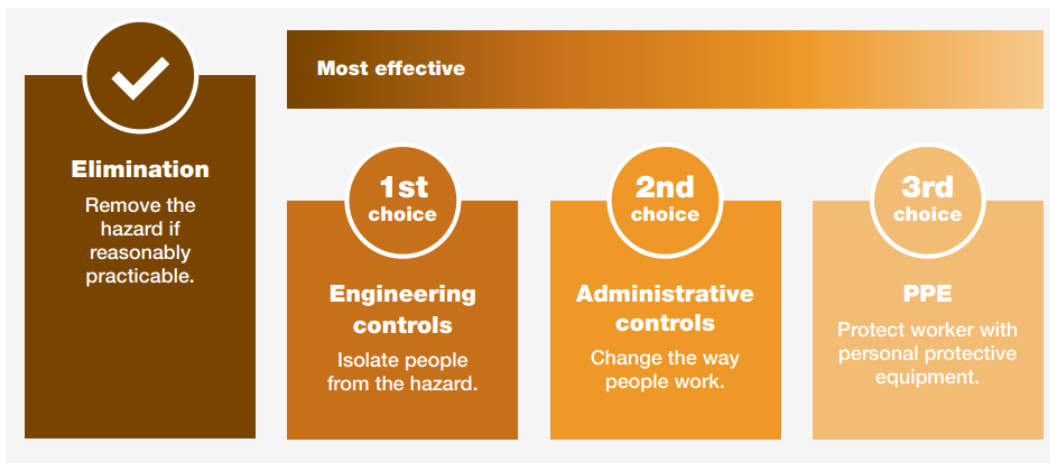
In contrast, other businesses prioritize prevention by implementing mutually reinforcing practices. They understand the importance of legal compliance and the benefits that accrue to customers (e.g., enhanced overall customer shopping/service experience), employees (e.g., morale, psychological health) and to their business (e.g., employee retention).

Programs that are not fully implemented and/or consistently supported by store management teams are of limited value. Thus, it is very important that store managers and supervisors demonstrate a strong commitment to all elements of the program, e.g., employee training, sufficient and competent supervision, risk assessment and acting on reports of customer abuse in a timely manner.

#### 4.1 Hierarchy of Controls

The hierarchy of controls (HoC) is a commonly used framework for mitigating the risk of injury or illness in workplaces (Figure 1). Although most often applied to preventing exposures to agents that cause occupational disease and controlling physical hazards in the workplace, the HoC is also applicable to reducing the risk of work-related violence and harassment. It is noteworthy that the Government of Alberta’s Occupational Health and Safety’s related guide to the HoC uses grocery stores as an example and cites harassment as a controllable hazard.

**Figure 1: Hierarchy of Controls**



Source: Government of Alberta. 2023. Hazard Assessment and Control: A handbook for Alberta employers and workers.

The HoC is straightforward in its design and application: potential workplace hazards are identified and then appropriate controls are applied to the hazards to reduce the risk of injury and illness.

It starts with the highest control, which is eliminating the hazard. If a hazard cannot be eliminated, the next tier of controls is substituting the hazard (e.g., using a safer cleaning product). Engineering controls separate workers from hazards (e.g., machine guarding). Administrative controls (e.g., training, policies and procedures) and, finally, personal protective equipment (PPE) are the most commonly used controls but also, in relative terms, they are the least effective because the hazard is still present and supervision is required to ensure consistent compliance among workers with work rules and the use of PPE.

Grocery stores primarily rely on training, written policies and procedures, and, to a lesser extent, signage to prevent and respond to incidents of customer harassment. In addition to these administrative controls, some stores use Plexiglas barriers to physically separate customers from cashiers, control store entry in the evening hours, employ uniformed security guards and ban customers and members of the public who have previously engaged in violent acts in the store.

Because higher level controls – that is, elimination, substitution and engineering controls – are not always practical or compatible for preventing harassment in customer service-focused grocery stores, meaningful adoption of administrative controls (i.e., appropriate training, consistent application of policies and procedures, supervisory support, ongoing risk assessment) are critical for both prevention and responding to incidents of customer abuse.

**Effective implementation of administrative controls depends on store-level leadership's full adoption of related policies (e.g., signage, zero tolerance approach), ongoing employee training and sufficient and competent supervision.**

## **5.0 Recommended Comprehensive Program**

### **5.1 Harassment Policy and De-Escalation Protocol**

Appendix 1 shows Safeway's existing harassment policy and proposed enhancements to the customer de-escalation protocol. These policies form the basis of Safeway's current program. Other recommended elements and improvements are outlined below.

### **5.2 Store Management Team Commitment**

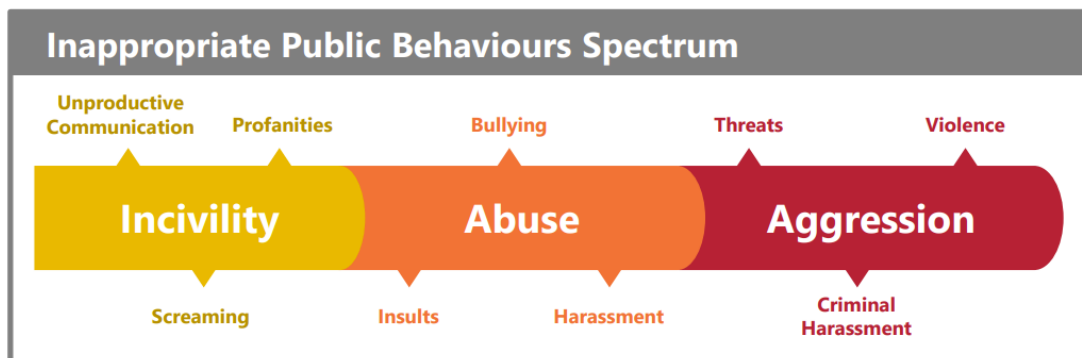
I recommend members of each store management team demonstrate their commitment to preventing customer abuse via a signed statement posted in the staff break room. In this regard, part of Safeway's current customer-facing sign communicating behavioural expectations (Appendix 2) would suffice with a few revisions. For example:

“Acts of [customer] aggression, intimidation, harassment or [rudeness] will not be tolerated. [We encourage employees to report incidents to us.] [Customers] who act in such a manner will be asked to leave the store. We commit to a safe environment for [Safeway employees]. [Signed store managers and supervisors]

### 5.3 Defining Inappropriate Customer Behaviours

Safeway’s respectful workplace policy collectively refers to acts of discrimination, harassment, sexual harassment, bullying and violence as “improper behaviour” (Appendix 1). Given the normalization and tolerance of inappropriate customer behaviour in service organizations, Safeway’s policy should provide examples of related customer behaviours. More generally, I recommend Safeway clearly illustrate the continuum of improper customer behaviour to further assist managers and employees with understanding and identifying these behaviours and to inform reporting. For example, in responding to the increased prevalence of harassment from members of the public, the City of Vancouver delineated a simplified spectrum of inappropriate behaviour.<sup>5</sup>

**Figure 2: Examples of Spectrum of Inappropriate Behaviour (City of Vancouver, 2024)**



### 5.4 Training

New Safeway employees are required to complete a series of on-line training modules through Sobey’s People Portal. These modules cover a range of topics (e.g., loss prevention, bagging) and vary in length. Most conclude with a short quiz to assess a worker’s knowledge of the related training. Current employees are expected to retake on-line training at different intervals although it is unclear if this is consistently mandated across Safeway stores in Alberta.

A shortcoming of relying solely on on-line training is that it does not require a new employee to demonstrate practical knowledge of the related training at their job. This is why in practice new Safeway employees are shadowed by an experienced employee

<sup>5</sup> City of Vancouver. 2024. Inappropriate Public Behaviours: Updating the City's Violence Prevention Program to Ensure a Respectful and Safe Work Environment for Employees. [https://council.vancouver.ca/20241009/documents/cfsc\\_Presentation1\\_PDF.pdf](https://council.vancouver.ca/20241009/documents/cfsc_Presentation1_PDF.pdf)

for each shift they learn a new task (e.g., using a deli slicer). New employees also wear a name tag indicating that they are a trainee to customers and their coworkers.

The current modules related to Safeway's respectful workplace policy and de-escalation protocol take 15 and 25 minutes to complete, respectively. The latter training involves three parts – frontend of the store, within the store and responding to physically aggressive or threatening customers – and ends with a simple five question quiz.

The main take-a-ways from this training are: “keep calm and use a level voice” when responding to an upset customer and ask the customer if they would like to speak with a manager. While effective in many circumstances, the practice of calling a supervisor or manager may not always be possible if a supervisor (or designated “person in charge”) is not available.

Providing adequate training to new and current employees to identify and de-escalate potentially abusive customer interactions is an important skill that all Safeway employees in customer facing roles should have. Unlike on-the-job training for bagging or using the deli meat slicer, for example, it is my understanding that new employees are not required to demonstrate a practical understanding and application of the respectful workplace policy and de-escalation protocol on the job. This should be a requirement.

I strongly recommend that Safeway introduce mandatory role playing exercises for new and current employees, supervisors and managers that give employees the opportunity to learn, practice and gain confidence using de-escalating techniques.<sup>8</sup> These skills are especially important for vulnerable workers. A 16- or 17-year-old cashier, for example, has less work and life experience and likely lacks the knowledge and confidence to respond to potentially abusive situations than an older, more experienced cashier. Employees (including all supervisors and managers) should be required to demonstrate their competence responding to multiple role playing exercises at least once per year. This training should be documented.

Requiring all employees to be trained in de-escalation techniques also enables employees who are not directly effected by customer abuse to intervene in situations where a co-worker is experiencing escalating mistreatment from a customer when a manager is not immediately available to help.

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<sup>8</sup> My understanding is that role playing exercises were a part of the previous Safeway customer service training known as “superior service training.” WestJet requires employees to complete on-line and in-person de-escalation training once a year. See, for example, <https://www.ctvnews.ca/calgary/article/westjet-calgary-take-bulk-of-disruptive-air-passenger-reports-in-canada-in-2025-transport-canada/>

Safeway requires managers to complete separate on-line training modules and in-person training. I did not have access to these training materials so I am not able to comment on their content.

However, in my conversations with union representatives, I learned that sometimes an in scope employee is designated as a “person in charge” when regular management are away from the store (e.g., late in the evening). Safeway must ensure that all employees who could be assigned to this role receive the full training for responding to incidents of customer abuse (e.g., receiving reports, responding to a customer who may become violent, implementing corrective actions).

Finally, Safeway must ensure that all related training is compliant with section 391 of the OHS Code.

### **5.5 Store Joint Health and Safety Committee Training**

Members of store joint occupational health and safety committees must be provided with appropriate training regarding how to carrying out their duties related to workplace violence and harassment (section 13(6) of the OHS Act).

Store committees should receive an annual summary of the number of incidents of customer abuse and be involved in all incident investigations when customer abuse and assaults result in injuries to workers. Ongoing information sharing and engagement with each store’s committee helps foster joint problem solving to address factors that increase the prevalence of customer harassment.

According to section 390.7(1) of the OHS Code, an OHS committee should also review the harassment and violence policy:

- (a) “when an incident of violence or harassment indicates a review is required;
- (b) where there is a change to the work or work site that could affect the potential for violence or harassment to occur;
- (c) if the joint health and safety committee or the health and safety representative requests a review
- (d) at least every three years.”

## 5.6 Signage

It is now commonplace for public and private sector organizations to use signage to communicate expectations about appropriate customer behaviour. Such signs not only communicate expectations but also consequences for mistreatment of employees (see Figure 3).

**Figure 3a: “Please be respectful. Abuse or threats against anyone will not be tolerated.”**



**Figure 3b: “Please be respectful. Abuse or threats against anyone will not be tolerated.”**



During my recent visits to three Edmonton-area Safeway stores, I observed four signs directed towards customer behaviour and one related to use of closed circuit television. Aside from the signage at the pharmacies, I did not observe any signs related to customer abuse at any of the self-serve checkouts, cash checkouts or customer service desk.

**Figure 4: “LOITERING & UNRULY BEHAVIOR ANYWHERE ON THIS PROPERTY ARE STRICTLY PROHIBITED” (Store 1)**



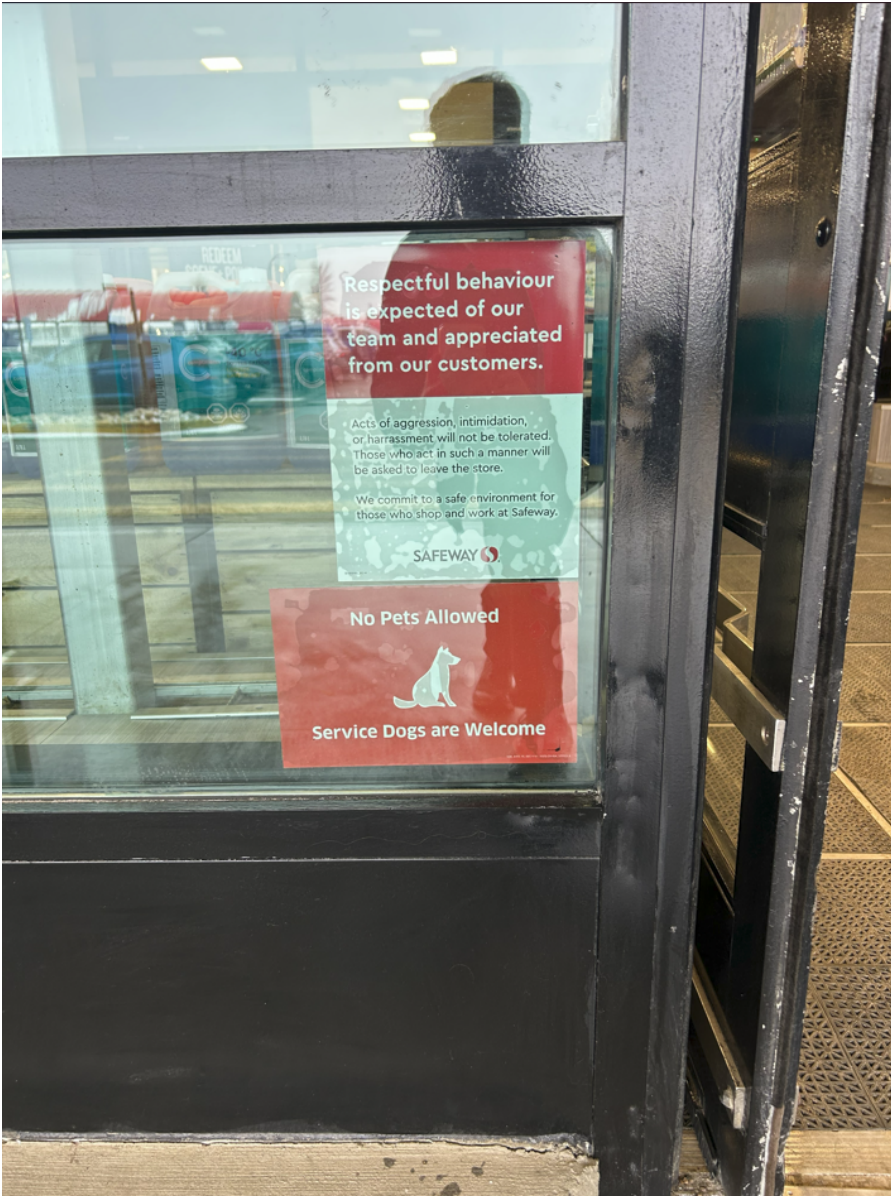
Figure 5a: “A Respectful Space” Health 360. (Stores 1, 2, 3)



Figure 5b: “A Respectful Space” Health 360. (Stores 1, 2, 3)



**Figure 6: “Respectful behaviour is expected of our team and appreciated from our customers.” (Store 3)**



**Figure 7: “ATTENTION. THESE PREMISES ARE MONITORED BY CLOSED CIRCUIT TELEVISION”**



Based on my observations of three Edmonton-area Safeway stores, the current signage related to customer behaviour expectations and consequences is both inadequate and insufficient.

Only one of the stores displayed Safeway's respectful customer behaviour sign (Figure 6) but it was placed out of the line of sight of customers – approximately 2.5 feet off the ground at the front entrance of the store. Most of the text was too small to read.

More importantly, as I noted during the October 2025 arbitration hearing, the message conveyed in the largest font – “Respectful behaviour is expected of our team and appreciated from our customers” – does not set a strong enough expectation of customer behaviour nor does it clearly communicate zero tolerance. And while the statement: “Acts of aggression, intimidation, and harassment will not be tolerated” is stronger it appears in smaller font and does not reflect the scope of inappropriate customer behaviour (rudeness, abuse) described in Article 20 of the CBA.

The Health 360 signs at the in-store pharmacies were observed at the point of service. While the poster communicates the need for respectful behaviour, it also could more effectively communicate zero tolerance and embody the breath of abusive customer behaviour described in Article 20.

**I recommend that Safeway and the UFCW co-develop appropriate language for a sign that communicates zero tolerance of customer abuse. The language should be clear and concise<sup>9</sup> and consistent with the Safeway brand.**

To be effective in terms of raising awareness and deterring inappropriate customer behaviour, the signs must be placed in visible locations, that is, where it matters, specifically, at the entrance to each store and at each point of sale terminal within each store including the service desk and self-serve check-outs.<sup>10</sup>

Simply relying on one sign at the entrance of the store is insufficient. WestJet, for example, places signage where customers line-up for service, and again at its check-in counter (Figures 3a and 3b). This reinforces the message where it matters, at the point of service.

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<sup>9</sup> Safeway's loitering and CCTV signs (Figures 4 and 7) meet this standard as both messages are clear and concise.

<sup>10</sup> Where cashiers serve customers the signage could appear on the Plexiglas or on larger customer order dividers that are placed along the checkout conveyor.

As part of this report, the union asked me to comment on the appropriateness of a sign they created (Figure 8). The largest font on the sign clearly and concisely communicates zero tolerance of customer abuse. The sign reflects the full range of behaviour described in Article 20. In my opinion, the sign is also consistent with the Safeway brand and customer service culture.

**Figure 8: “ZERO TOLERANCE FOR STAFF ABUSE”**



A final note on signage: related posters communicating the spectrum of customer abuse and encouraging reporting of related incidents should also be developed and displayed in the staff break room of each store.

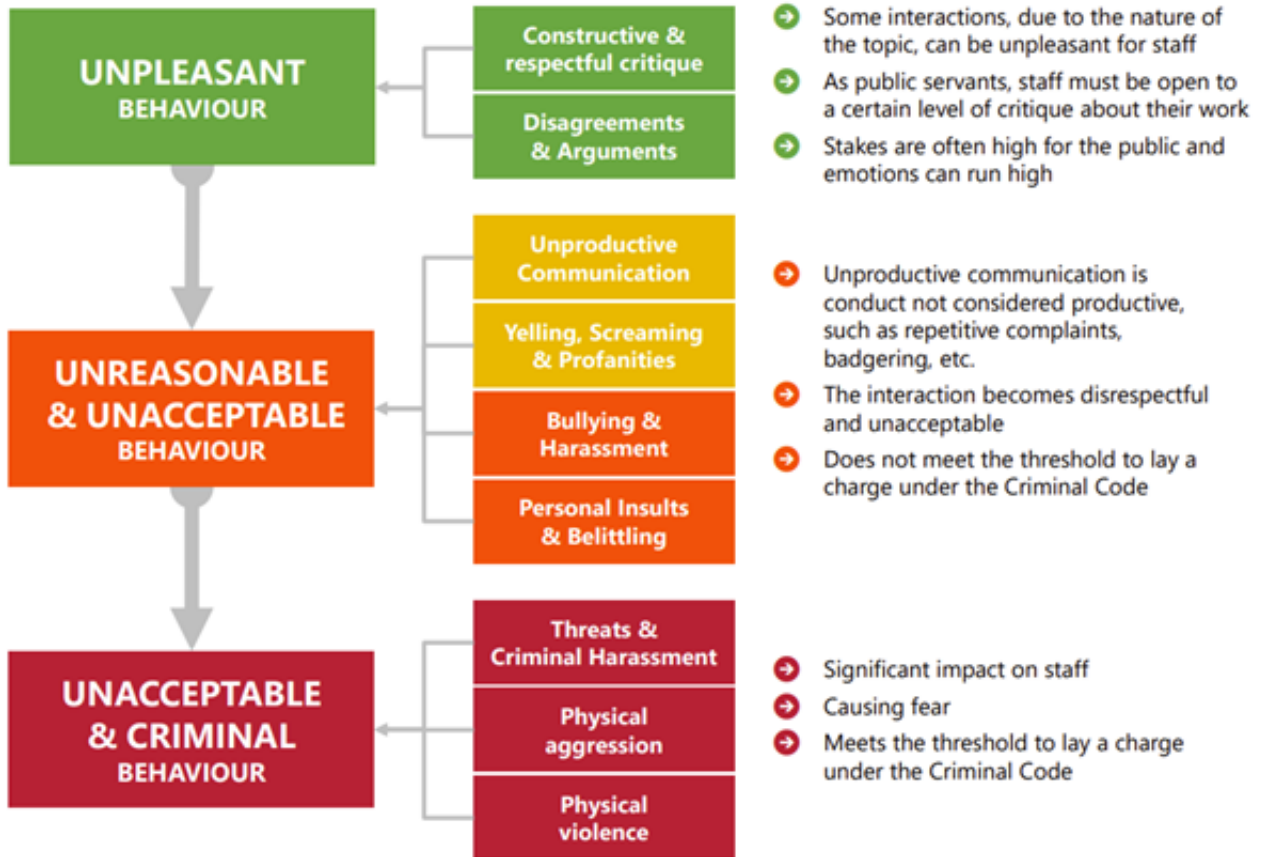
However, to be clear, while consistent and visible placement of appropriate signage is an important element of the proposed revised program, signage alone will not address customer abuse.

## 5.7 Reporting Incidents of Customer Abuse

Section 390(1) of Alberta's OHS Code requires employers implement procedures for reporting and investigating incidents of violence or harassment. Safeway's current de-escalation protocol only requires employees to report violent incidents and threats. Thus, for the purpose of legal compliance, ongoing store-level risk assessment, tracking progress towards reducing the prevalence and severity of customer abuse, I recommend Safeway implement an accessible, straightforward reporting procedure for all incidents of customer abuse. To signal the importance of reporting to store managers, Safeway's head office may wish to initially establish modest store-level targets for reports of customer abuse.

Consistent with the continuum of inappropriate behaviour shown in Section 5.3 of this report, and for clarity about which negative customer interactions should be reported to management, I recommend Safeway develop a framework modeled on the City of Vancouver's for reporting purposes (Figure 9) that is appropriately calibrated with the language in Article 20. Safeway's respectful workplace policy and de-escalation protocol should require (and managers should encourage) employees to report "unreasonable and unacceptable" (orange) and more severe behaviours including violence (red), whereas, there should be no requirement to report customer interactions of an unpleasant nature (green).

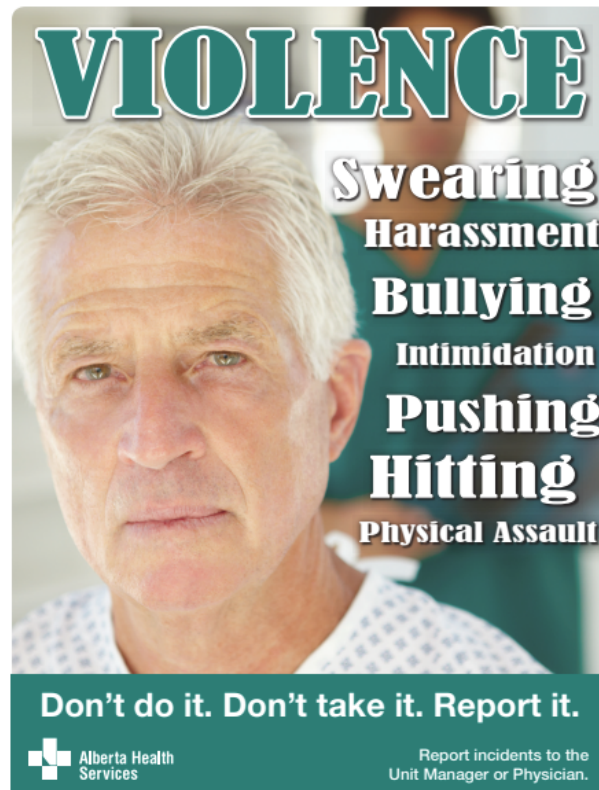
**Figure 9: Continuum of Behaviour (City of Vancouver, 2024)**



Reporting should include basic information about the incident, i.e., date, time of day, brief description of the nature of the incident including factors that potentially contributed to the incident, resolution (if applicable). This information should be compiled by store location and be used to identify potential aggravating factors, and summarized and shared annually with Safeway's provincial joint OHS committee. Managers should communicate to employees that the purpose of reporting is for learning and improved prevention, not discipline.

Due to the normalization of improper customer behaviour and a fear of job loss, some employees are reluctant to report customer harassment. Therefore, it is important for store managers to build a strong reporting culture, with consistent encouragement for reporting and consistent follow-up with employees after incidents. For example, Alberta Health Services has used posters to encourage reporting a range of patient violence and abuse. But here again, signage alone is insufficient for motivating employee reporting.

**Figure 10: Alberta Health Services Poster Encouraging Violence Reporting <sup>11</sup>**



<sup>11</sup> Alberta Health Services. <https://www.albertahealthservices.ca/assets/info/hp/ps/if-hp-ps-work-violence-patient-poster.pdf>

## **5.8 Supporting Employees that Experience Customer Abuse**

Safeway employees who report customer abuse should be encouraged to take time in the staff break room to debrief and regroup. This is especially important for young workers, newcomers to Canada and other vulnerable groups of workers. Consistent with Alberta's OHS Code, all employees who report experiencing harassment should be provided with contact information for psychological support.

Employees who experience psychological injury and miss scheduled work due to a violent incident or threats of violence are entitled to compensation from the Alberta Workers' Compensation Board. Related injuries must be reported by Safeway.

## **5.9 Investigation, Corrective Actions and Risk Assessment**

It is critical for the program's overall success that store managers consistently investigate and respond to all reports of customer abuse. Investigations and regular risk assessments enable store managers and joint OHS committees to identify and control unique risks of customer harassment at their location.

Safeway's current respectful workplace policy outlines investigation procedures and consequences for employee, contractor and other third party harassment but it does not describe consequences for customers who engage in harassment of employees. Practice guidance for store managers is needed here.

It is my understanding that Safeway managers may offer a \$25 gift card to a customer who is upset. While this may be an appropriate and effective approach for resolving some customer complaints, it is inconsistent with a zero tolerance approach in cases of customer abuse. In these situations, a manager must give a verbal warning or direct the person to leave the store.

Safeway's harassment policy, de-escalation protocol, and management training must emphasize a zero tolerance approach and define corrective actions that managers and supervisors must take when responding to incidents of customer abuse. Managers should be provided with appropriate scripts for responding to these situations. For example, "Your conduct is inappropriate and you'll have to leave. You are welcome back tomorrow."

Finally, in cases where it is not possible for managers to immediately investigate reported incidents, they should do so later and commit to following up with both the employee and customer. To do this, a manager may need to ask a customer for their phone number or email address.

### **5.10 In-store Security Personnel and Store Greeters**

The presence of uniformed security guards in Safeway stores not only acts to deter theft but also deters customer abuse. Standardized security guard training emphasizes de-escalation techniques and intervention into potentially volatile situations. I recommend that Safeway employ security guards at high risk stores and at times of elevated risk such as the evening hours. Trained store greeters should also be considered as they may be effective in establishing appropriate behavioural norms when customers enter a store.

### **5.11 Review of Program**

The OHS Code requires employers review their harassment policy at least once every three years or following a serious incident. Given the scope of my recommended changes, I suggest Safeway review its updated harassment program two years after its full implementation and in consultation with the joint provincial health and safety committee.

## **6.0 Program Implementation and Evaluation**

For the long-term success and sustainability of the program, I encourage Safeway to engage its provincial joint OHS committee and the union in further developing the proposed enhanced program and participating in its launch. A collaborative approach will help ensure maximum buy-in among store managers and frontline employees.

I want to reiterate that meaningful adoption of administrative controls (i.e., appropriate training, consistent application of policies and procedures, supervisory support, ongoing risk assessment) is critical to both prevention and effectively responding to incidents of customer abuse.

Finally, in terms of evaluation, I recommend a pre- and post-program implementation survey of frontline workers assessing their experience of harassment, comfort with reporting incidents, perceptions of management commitment to the program, satisfaction with the new policy. This evaluation should also consider other relevant store-level data including recommendations from joint OHS committees and an analysis of reports of customer abuse.

## References

Government of Alberta. 2023. *Hazard Assessment and Control: A handbook for Alberta employers and workers*. <https://open.alberta.ca/dataset/7a28f225-2014-4ce5-be98-ea9f8a479cad/resource/4dec278b-fce7-4f6e-9884-7918649b2750/download/jet-ohsorp-bp018-hazard-assessment-and-control-2023-10.pdf>

## Appendix 1: Safeway's Respectful Workplace Policy

Sobeys is committed to provide a safe, healthy, and respectful workplace that is free of all forms of discrimination, violence, and harassment, including bullying and sexual harassment. Disrespectful or violent behaviour, discrimination, bullying or harassment of any sort ("*Improper Behaviour*") by any employees of Sobeys, contractors or suppliers will not be tolerated.

### COMMITMENT TO A RESPECTFUL WORKPLACE

Every employee is entitled to work in a safe environment that is respectful and free from *Improper Behaviour*. All employees and contractors have a responsibility to refrain from participating in behaviour that is or could reasonably be perceived as disrespectful in nature and/or contrary to this Policy. Any form of *Improper Behaviour* is unacceptable, strictly prohibited and will not be condoned.

Sobeys recognizes that *Improper Behaviour* is an occupational health and safety hazard which may cause physical, emotional or psychological harm. Sobeys is committed to minimizing and, to the extent possible, eliminating the risk of *Improper Behaviour* in the workplace. This includes *Improper Behaviour* by customers of Sobeys.

### SCOPE

This Policy applies to all Sobeys employees working in Offices, Corporate Stores, Distribution Centres, as well as contractors, suppliers and third parties. Compliance with the Policy is expected at all times when on Sobeys' business and premises, and when operating Sobeys' vehicles and equipment.

This Policy does not limit Sobeys' right to manage its employees or direct the workforce. Performance reviews, work assignments, evaluations or disciplinary measures taken by Sobeys for any valid reason does not constitute violations of this Policy.

### DEFINITIONS

**Discrimination:** "Discrimination" occurs where a person is treated differently, either intentionally or unintentionally, based on a protected ground of discrimination, including but not limited to:

- Race (or perceived race), colour, ancestry, aboriginal origin, place of origin, ethnicity, nationality or citizenship
- Marital or family status
- Religion, religious belief(s) or creed
- Sex, gender, gender identity or expression as well as sex determined characteristics or circumstances
- Sexual orientation
- Age
- Social status or perceived source(s) of income
- Mental disability, physical disability and related characteristics or circumstances
- Political belief, affiliation, opinion, association, activity or convictions
- Physical appearance (weight or physical size)
- Pregnancy or possibility of pregnancy

The list above is not intended to set forth all prohibited grounds of discrimination, which may vary from province to province. Please consult your provincial human rights website for a complete list of protected grounds of discrimination in your province.

**Violence:** “Violence” includes (but is not limited to):

- Attempted or actual exercise of physical force so as to cause injury to another person.
- Any threatening statement or behaviour that gives a person reasonable cause to believe that they are at risk of injury or that physical force will be used against them.
- Behaviour that would be considered intimidating to a reasonable person such as invasion of personal space, uttering threats, yelling or the use of profanity.
- Causing intentional damage to property, whether property of Sobeys, an employee, a contractor or a third party.
- Any inappropriate, unwelcome, persistent or annoying conduct, comment, display, action or gesture that constitutes a threat to the safety or integrity of another person
- Conduct or attempted conduct of a person that endangers the health or safety of another person.
- Bringing weapons or other potentially dangerous items onto Sobeys’ property without the appropriate special approval.
- Being or likely to being exposed to domestic violence at the work site.

**Harassment:** “Harassment” includes (but is not limited to):

- Any inappropriate, unwelcome, persistent or annoying conduct, comment, display, action or gesture which adversely affects the psychological or physical well-being of another employee, or that is known or ought to be known as unwelcome and cause intimidation, humiliation or that has a lasting effect on another employee. This may or may not be based on a prohibited ground of discrimination discussed above.
- Stalking that causes employees reasonably to fear for their own safety.
- Bullying, as defined below.
- Sexual Harassment, as defined below.
- On the part of the Company and its managers, knowingly permitting or failing to take reasonable steps to stop any of the above.

**Bullying:** “Bullying” includes (but is not limited to):

- Spreading malicious gossip or rumours about a person.
- Targeted social isolation of a person or group of people.
- Vandalizing a person’s belongings or work equipment and/or sabotaging a person’s work product.
- Making attacks or derogatory statements based on someone’s private life and/or personal traits.
- Cyber-bullying, electronic or online bullying as well as sending embarrassing, hurtful and/or threatening messages using technology including the internet or mobile phones/devices.
- Any other repeated pattern of behaviour intended to intimidate, offend, degrade or humiliate a particular person or group.

**Sexual Harassment:** “Sexual harassment” includes (but is not limited to):

- Objectionable and unwelcome sexual solicitations or advances. This may include persistent expression of romantic interest which is known or ought to be known to not be shared by the

other party.

- Any conduct, comment or contact of a sexual nature that is likely to cause offence or humiliation to a reasonable person. This includes suggestive physical expressions of a sexual nature.
- Displaying material with sexually offensive or obscene content.
- Addressing individuals using gender specific terms of endearment. Examples of terms of endearment include girl, dear, sweetie, honey.
- Comments on dress, appearance and physical features of a sexual nature.
- Sexual solicitation or advances made by a person in a position of authority or to confer or deny any benefit to the recipient.
- Conduct, comment or contact of a sexual nature that, on reasonable grounds, might be perceived as placing a condition of a sexual nature on employment or an opportunity for training or promotion.
- Punishment, reprisal or threat of reprisal against a person for rejection of a sexual solicitation or advance.

## **EMPLOYER RESPONSIBILITIES**

Sobeys takes its obligation to provide a safe workplace seriously and will take all reasonable and practical efforts to ensure that no employee is subject to *Improper Behaviour* of any nature and will act on any reported complaint. Sobeys is committed to implementing measures to control any identified risks or hazards of *Improper Behaviour* in its workplaces, in accordance with applicable provincial laws.

All incidents of conduct of which Sobeys becomes aware that could be considered *Improper Behaviour* will be investigated on a case-by-case basis to ensure appropriate steps are taken. Circumstances and information related to an incident obtained during the investigation process will remain confidential and will not be disclosed unless required for investigating or taking corrective action or discipline, or if otherwise required by law. When it is necessary to inform employees of a specific or general threat of violence, Sobeys will disclose the minimum amount of personal information that is necessary to inform employees or as otherwise required by law. Sobeys is committed to delivering training, education and information to prevent *Improper Behaviour* in the workplace, as well as implementing procedures, work practices, and administrative arrangements to eliminate the risk of violence, in accordance with applicable provincial laws.

## **REPORTING PROCESS**

Should an employee experience violence in the workplace (e.g. robbery, physical attack, assault, etc.) or require medical assistance, they should immediately inform the police and/or emergency service providers. If employees are not in immediate danger, they should inform their supervisor who in turn will contact the appropriate authorities or responder.

If an employee believes that an incident of violence is likely to occur, they should advise their direct supervisor, Sobeys management, their HR Business Partner, Loss Prevention, or another appropriate individual at the premises.

Employees who are subject to conduct that could constitute *Improper Behaviour* may approach the person(s) who has subjected them to this conduct, explain to them how their behaviour has affected them and ask that it stop.

However, Sobeys appreciates that employees may not be comfortable approaching the person who has subjected them to adverse treatment. In those circumstances, employees should report the conduct to another individual they feel comfortable with such as their manager, HR Business Partner, or any other management employee. Should the conduct at issue involve the employee's immediate supervisor, reporting it to the next level of management at Sobeys or to their HR Business Partner is also appropriate. At no time should an employee feel that they have to suffer in silence if a violation of this Policy has occurred or feel discouraged from exercising their rights pursuant to any other law.

Employees who witness (but are not subjected to *Improper Behaviour*) also have an obligation to report this conduct to their direct supervisor, Sobeys management or their HR Business Partner.

Employees who prefer to remain anonymous can report *Improper Behaviour* through the Ethics Line at 1-888-427-2530 or designated channel specific to your location.

Employees who are subject to *Improper Behaviour* by a customer should immediately report the conduct to their immediate supervisor or other management at the premises.

Sobeys is firmly opposed to any acts of reprisal against any employee(s) who exercise their rights under this Policy in good faith. Human Resources should be advised of any instances of reprisal.

Complaints that have been made for frivolous or vindictive reasons are prohibited and may warrant discipline up to and including termination.

Any employee who has been affected by an incident of *Improper Behaviour* is advised and encouraged to consult a health-care provider or attend post-incident counselling (Employee Assistance Program) as they see fit.

Employees also have rights under applicable human rights and occupational health and safety legislation. Nothing in this Policy is intended to discourage or preclude an employee from exercising other legal rights or remedies that may be available.

## **INVESTIGATION**

Upon receiving a complaint or learning of *Improper Behaviour* Sobeys will initiate an investigation.

The scope of investigation will be determined on a case-by-case basis and may include:

- Interviewing the employee who has been subject to the alleged conduct that contravenes this Policy
- Interviewing the person(s) alleged to have acted inappropriately

- Interviewing witnesses
- Determining and considering the facts and consequences
- Advising all individuals involved in the investigation, including witnesses, of the obligation to maintain confidentiality

An employee, pursuant to any applicable Collective Bargaining Agreement, may request and be provided with representation as long as such representation may be accommodated without unduly delaying the investigation.

Following the investigation, Sobeys will advise the person alleged to have been subject to treatment that is contrary to this Policy and the person(s) alleged to have acted inappropriately of the results of the investigation, either verbally or in writing, which will be determined based on circumstances and as per legislative requirements. Sobeys shall share the outcomes of the investigation with relevant parties as required as part of any corrective action or disciplinary process. Sobeys shall implement, as per legislative requirements, measures to eliminate or control identified hazards of *Improper Behaviour*.

There is an obligation on all parties to cooperate with the investigation and to prevent disclosure of the confidential information. Information obtained about an incident or complaint, including identifying information about any individuals involved, will not be disclosed unless required for investigating or taking corrective action or discipline, or is otherwise required by law.

#### **CONSEQUENCES OF A POLICY VIOLATION**

Employees found, whether through investigation, direct observation or otherwise, to have engaged in activities or behaviour that constitutes *Improper Behaviour* will be subject to discipline, up to and including termination of employment.

Contractors, suppliers and third parties who are found to have violated this Policy may have their commercial agreement(s) with Sobeys and/or access to Company premises rescinded. Where applicable, conduct that is contrary to this Policy shall also be reported to the appropriate authorities.

## Appendix 2: Proposed Enhancements to Safeway's De-escalation Protocol

Recent reports from stores across the country have shown a sudden increase in Acts of hostility or aggression towards store employees, particularly towards cashiers, **continue to be an issue in grocery stores across Canada**. While most customers are dealing with the stresses of the Covid-19 pandemic in a positive way, some customers are handling the stress poorly and are venting their frustration inappropriately. To maintain employee safety, the following recommendations are provided to **Managers and employees must take the following steps to try to prevent or de-escalate inappropriate customer behaviour** tense or potentially tense situations.

### Verbal **Abuse**: De-escalation at the Point of Sale

- ~~Ensure that you remain behind the plastic barrier.~~
- Keep your voice calm and level.
- Don't cross your arms, simply maintain a natural, neutral stance.
- Do not engage in an argument with the customer.
  - If the customer is complaining you can say, "I'm sorry to hear that, would you like me to get a manager for you?"
  - If the customer is lashing out at you, "I hear what you are saying; let me call a Manager to assist you."
  - If the customer begins recording (audio or video) during any of these situations you can say, "I am not comfortable with you recording me I am calling my Manager."
- Immediately contact your Manager or the Manager on Duty to speak to the customer.
- **We have zero tolerance for this activity in our stores. You are not required to serve the customer after the Manager has addressed the issue.**

### Verbal **Abuse**: De-escalation within the store/outside of the store

In the event of an angry customer who approaches an employee:

- Ensure that you maintain at least 2 metre social distance.
- Do not physically block any aisle or exit door.
- Keep your voice calm and level.
- Don't cross your arms, stand at a diagonal with one foot closer to the customer and the other foot shoulder length apart behind and turned to allow for quick escape and balance if required.
- Hands should be held up slightly with opened palms facing outward to help calm the customer and to be ready to push off any escalated physical threat to help allow for a safe escape.
- Do not engage in an argument with the customer.
- If the customer is complaining you can say, "I'm sorry to hear about your experience, please wait here and let me get a manager to assist you."
- At any time, if the customer begins recording (audio or video) kindly inform the customer, "I am not comfortable with you recording me, and I will need to get a manager." The customer may be seeking a negative reaction, so it is important to remain calm and remove yourself from the interaction if they do not stop recording.

- Immediately contact your Manager or the Manager on Duty to speak to the customer.
- **We have zero tolerance for this activity in our stores. You are not required to serve the customer after the Manager has addressed the issue.**

### **Physical Aggression/Threatening Behaviour**

If a customer becomes physically violent, or threatens an employee:

- Ensure that you ~~remain behind the plastic barrier and/or~~ increase distance if able.
- Keep your voice calm and level / protect yourself if required, however do not retaliate.
- Immediately contact your Manager or the Manager on Duty to speak to the customer.
- ~~If you are in immediate danger~~ Tell the customer, "I'm sorry I need to get a manager," leave and move to a secure area immediately.
- Uttering threats is a criminal offense and we have zero tolerance for this activity in our stores.

### **Manager Responsibilities:**

#### **Verbal Conflicts Abuse**

- If the conflict involves two people who are in the vicinity of one another direct the employee or customer who appears to be the non-aggressor to kindly wait for you in a specific area out of earshot from the aggressor.
- Thank the non-aggressor and inform this compliant person you will come speak with them immediately afterwards. Employees can be asked to go to a service desk or employee lunch room.
- **Separate the customer from the employee.** Try to calm the customer after listening to their concerns by offering some resolutions or asking them how you can help them resolve the situation.
- **Ask the employee if they wish to temporarily step away from their duties (employee lunch room)**
- **Follow up with the employee afterwards for more information about the incident, offer appropriate supports and determine if corrective action is needed.**
- **Document the incident**

### **Physical Aggression/Threatening Behaviour**

- Try to calm the customer and inform them that this behaviour will not be tolerated, and you need them to calm down immediately.
- If they refuse to calm down, calmly and firmly inform them that you must refuse service and will not be able to serve them today.
- At any time, if the customer or somebody else in the vicinity is recording (audio or video), you can ask they do not comply, remain calm, and you can remove yourself from earshot as you can then call police to support for a causing disturbance complaint.
- If they refuse to comply, inform them that the police will be called if they do not leave the store.
- Call the police if necessary, and if you believe there is an immediate threat to staff and customer safety do not hesitate to call 911.

- Notify the customer that police are being called, and you need them to please leave the store.
- Do not try to physically apprehend or restrain the customer. Let them leave the store, the Police will deal with the matter. Employee/customer safety is paramount.

### **Physically Violent Behaviour**

- Do not hesitate to call the police immediately via 911, you might want to assign that task to somebody in the area to be able to provide a calm dialogue to allow you to verbally engage and direct staff/customers away from the conflict.
- Use immediate verbal commands by shouting, "Stop, I need you to stop now!" If this does not work, repeat the "Please stop" and "stop now" commands and inform them "Police are on the way."
- You must never engage in physical conflicts.

All incidents of violence or threats towards an employee must be reported to your Loss Prevention Manager, Human Resources and your DO.

### Appendix 3: Safeway's Current Respectful Behaviour Sign

**Respectful behaviour is  
expected of our team and  
appreciated from our  
customers.**

Acts of aggression, intimidation, or harassment  
will not be tolerated. Those who act in such a  
manner will be asked to leave the store.

We commit to a safe environment for those  
who shop and work at Safeway.