



EDUCATORS FINANCIAL GROUP INC.

MULTI-YEAR AODA ACCESSIBILITY PLAN

Reviewed and updated October 2023  
Previously reviewed April 2020

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## **STATEMENT OF COMMITMENT**

Educators Financial Group is committed at all times to provide its services in a way which respects the dignity and independence of people with disabilities. We are committed to giving people with disabilities the same opportunity to access our services and allowing them to benefit from the same services, in a similar way as other clients.

We are committed to meeting the needs of people with disabilities in a timely manner and will do so by preventing and removing barriers to accessibility and meeting accessibility requirements under the Accessibility for Ontarians with Disabilities Act (“AODA”) and the related Integrated Accessibility Standards Regulation (“IASR”).

This Multi-Year Accessibility Plan summarizes the actions taken to identify, remove and prevent barriers to persons with visible and non-visible disabilities. It also outlines the actions that Educators Financial Group will put into place in the years ahead to improve opportunities for people with disabilities.

This plan will continue to be reviewed and updated at least once every five years.

### **Related Policies:**

- Accessibility Standards for Customer Service Policy
- Accommodation Policy
- Workplace Strategy Playbook and Hybrid Work Form
- Recruitment and Selection Policy
- Workplace Violence and Harassment Policy

## **MULTI-YEAR ACCESSIBILITY PLAN**

### **Maintenance of accessibility policies and multi-year accessibility plan**

Educators Financial Group has maintained an accessibility policy which governs how our company will achieve accessibility through meeting the requirements under the AODA and IASR. A multi-year accessibility plan has been enacted and reviewed which summarizes the actions taken to identify, remove and prevent barriers to persons with disabilities, and outlines the actions that the company will continue to take to proactively improve opportunities for people with disabilities.

The plan is divided into the following sections:

1. Customer Service Standard
2. Information + Communications Standard
3. Employment Standard
4. Design of Public Spaces Standard
5. Training

The policy and plan are written and available on our website. The policy and plan can be provided in an accessible format upon request. Both the policy and plan are updated at least once every five years.

### **1. Customer Service Standard**

Educators Financial Group has created and put in place a customer service policy that

- Considers a person’s disability when communicating with them;
- Allows assistive devices in the workplace, like wheelchairs, walkers and oxygen tanks;
- Allows service animals;
- Welcomes support persons;
- Informs customers when accessible services aren’t available;
- Ensures staff are trained on policies, practices and procedures that affect the way services are provided to people with disabilities; and
- Invites customers to provide feedback

Educators Financial Group has trained staff on accessible customer service and has an ongoing process to train new staff with regards to the customer service standard.

Educators Financial Group has put the customer service plan in writing and made the plan available to the public and employees. The plan can be accessed [here](#) and is available in accessible formats, if requested.

Educators Financial Group has reported its progress online by filing an accessibility report with the Minister of Community and Social Services. Educators Financial Group will continue to comply with the customer service standard by filing an accessibility report every 3-years.

## **2. Information and Communication Standards**

### **a. Accessible Formats**

Educators Financial Group has taken the following steps to ensure all publicly available information is made accessible upon request:

- Let the public know that we will make information accessible upon request including written communication in hard copy, email, colour (if available) and large print.
- Consult with people who request accessible information to figure out how to meet their needs, as soon as possible.

### **b. Websites**

Educators Financial Group has implemented a number of measures (i.e. improving colour contrast and navigation) to ensure that all current and new website content conforms with WCAG 2.0, Level AA standards.

### **c. Feedback**

Educators Financial Group has put into place an accessible feedback process to receive and respond to feedback from customers and members of the public who have a disability. The feedback process and a form are available to the public on our website and by client request and available in accessible formats on request.



To ensure the existing feedback processes are accessible to employees with disabilities, Educators Financial Group has invited feedback to be provided in any format such as telephone, email, mail and in-person.

### **3. Employment Standards**

#### **a. Recruitment**

Educators Financial Group is committed to fair and accessible employment practices. We have taken the following steps to notify the public and staff that, when requested, Educators Financial Group will accommodate people with disabilities during the recruitment and assessment processes and when people are hired.

- Let job applicants know that we will accommodate disabilities during the selection process, as part of the application instructions on each job posting;
- If a job applicant requests accommodation, consult with them and make adjustments that best suit their needs; and
- Notify successful applicants of our policies for accommodating employees with disabilities.

#### **b. Informing Employees of Supports**

Educators Financial Group supports employees with disabilities, including, but not limited to, providing job accommodations that take into account an employee's accessibility needs due to a disability. We ensure all employees are aware of these supports by taking the following steps:

- Clearly communicated the policy to all staff at the time of its' creation;
- Maintain the policy in Internal HR Public Folder and reference in the Employee Handbook;
- Continue to educate new hires on this policy as part of the orientation process; and
- Keep employees up to date on changes to existing policies on job accommodations with respect to disability.

#### **c. Workplace emergency response information**

Educators Financial Group has created a process for documenting accessibility issues for employees and for documenting individualized workplace emergency response information. Educators Financial Group has provided all employees with accessibility issues in emergencies individualized workplace emergency response plans. Educators Financial Group will review the emergency response information when:

- the employee changes work locations;
- we review the employee's overall accommodation needs;
- we review our organization's emergency response policies.

#### **d. Documented individual accommodation plans and return to work process**

Educators Financial Group addresses and eliminates barriers in accommodation and return to work processes. Corporate policies surrounding accommodation and return to work are followed, where applicable. The following steps have been taken:

- Policies and procedures have been created that describe the steps that Educators Financial Group will take to accommodate an employee with a disability and to facilitate an employee's return to work after absenteeism due to disability.
- These policies include a process for the development of documented individual accommodation plans for employees with a disability, if such plans are required.
- The process for the development of documented individual accommodation plans includes the following elements:
  - A manner in which the employee requesting accommodation can participate in the development of the plan;
  - The means by which the employee is assessed on an individual basis;
  - Steps to protect the privacy of the employee's personal information;
  - A regular frequency in which individual accommodation plans will be reviewed and updated and the manner in which this will be done;
  - Provides for the individual accommodation plan to be delivered in a format that takes into account the employee's accessibility needs
- If individual accommodation plans are established, Educators Financial Group ensures that they include:
  - Individualized workplace emergency response information that is required;
  - Any information regarding accessible formats and communication supports that have been provided for or arranged, in order to provide the employee with:
    - Information that is needed in order to perform the employee's job;
    - Information that is generally available to employees in the workplace.

The return to work process as set out in Educators Financial Group's policies outlines the steps we will take to facilitate the employee's return to work after a disability-related absence, outlines the development of a written individualized return to work plan for such employees, and requires the use of individual accommodation plans, as discussed above, in the return to work process.

#### **e. Performance management, career advancement and redeployment**

We will take the following steps to ensure the accessibility needs of employees with disabilities are taken into account in Educators Financial Group's performance management, career development and redeployment processes:

- Make performance management accessible by:
  - Reviewing our employees' accommodation plans to understand their needs and see whether we need to make adjustments to help them succeed;
  - Making performance management documents, such as performance plans, available in accessible formats, such as large print, when asked; and
  - Providing feedback and coach your employees in a way that is accessible to them, such as using plain language for an employee who has a learning disability.
- When we provide career development opportunities, we consider what accommodations an employee with a disability may need to:
  - learn new skills or take on more responsibilities in their current position; and





- consider what we could do to help our employees with disabilities succeed in other positions in our organization when they change jobs.

#### **4. Design of Public Spaces Standard**

Educators Financial Group takes in account the needs of those with disabilities when designing the layout and furniture placement of our public spaces. Our waiting area and private meeting rooms are designed to avoid accessibility barriers. We continue to evaluate our spaces based on the public and our client's needs and respond to feedback as required and requested.

#### **5. Training**

Educators Financial Group is committed to providing training in the requirements of Ontario's accessibility laws and the Ontario Human Rights Code as it applies to people with disabilities. To this aim, the following measures have been exacted:

- Appropriate training on the requirements of the IASR and on the Ontario Human Rights Code as it pertains to persons with disabilities, is provided to all employees, volunteers, third-party contractors who provide goods, services and facilities on Educators Financial Group's behalf, and persons participating in the development and approval of our policies;
- Training is provided to persons referenced above as soon as practicable;
- A record of the training provided is kept and maintained, including the dates that the training was provided and the number of individuals to whom it was provided;
- On an ongoing basis, training is provided on any changes to the prescribed policies.

#### **FOR FURTHER INFORMATION**

For more information, questions, or concerns regarding accessibility at Educators Financial Group or to request communication in an accessible format, please contact:

VP of Human Resources

Phone: 416-752-6843 ext. 3591

