

*People Access*

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THE NATIONAL QUALITY INSTITUTE

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**AccessPATH<sup>®</sup>**

## **The AODA Compliance Tool**

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A Guide to Implementing the Customer Service Standards under the  
Accessibility for Ontarians with Disabilities Act (2005)

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## **Customer Service is About to Improve All Over Ontario**

There is no argument when it comes to choosing the #1 ingredient in a successful business: *satisfied customers!* So there is little doubt that business owners will readily embrace a new Ontario legislation that requires them to improve accessibility to their goods and services by removing and preventing barriers for people with disabilities. And that makes things easier for everyone!

The first legislation of its kind anywhere, The Accessibility Standards for Customer Service, Ontario Regulation 429/07 of the Accessibility for Ontarians with Disabilities Act 2005 (AODA) gives an employer until January 1, 2012 to take action on ensuring that its policies, practices, and procedures are consistent with the core principles of independence, dignity, integration, and equality of opportunity.

The Customer Service Standards are primarily about removing attitudinal and systemic barriers. Employers are expected to educate their staff about the different kinds of disabilities, and give them confidence in communicating with, and serving, people with disabilities. A clear policy from management, well-communicated to knowledgeable employees, goes a long way to empowering each person to provide exemplary customer service in every situation. There are many ways to help people with disabilities access your wares without making large or expensive changes to your business. It begins with a simple "How may I help you?"

Other standards will address the removal and prevention of the following barriers:

- Information and communication barriers
- Employment barriers
- Transportation barriers
- Architectural and physical barriers

Over 15% of the population has a disability, including almost 40% of people over the age of 65. This demographic is growing rapidly, and businesses that make it easier for people with disabilities to buy their wares will outperform those that do not. Consider that over 50% of the population either have a disability, or have a friend or loved-one with a disability. Removing barriers is going to swing a lot of buying power to businesses that act first and fast. The Royal Bank of Canada estimated in 2000 that people with disabilities have spending power of about \$25 billion each year in Canada!

There is much respect for creating a situation that is “win-win-win” and that is just what the Ontario government has done.

- People with disabilities win
- Businesses win
- Society wins

Contact the People Access division of the National Quality Institute (NQI) to learn more about how your organization can become a role-model and early adopter of the Customer Service Standard. In partnership with the Accessibility Directorate of Ontario, NQI has developed clear, concise, and time-saving fill-in-the-blank templates that can take you all the way to compliance or customer service excellence, long before Ontario’s deadlines, and qualify your company for awards recognition as well.

## Introduction to this Guide

The purpose of this Guide is to provide a 'how-to' roadmap for businesses when implementing the *Customer Service Standards* of the *Accessibility for Ontarians with Disabilities Act, 2005 (AODA)*. This Guide will indicate the things that an organization must do to achieve compliance.

Accessibility standards are the rules that organizations in Ontario will have to follow to identify, remove, and prevent barriers to accessibility. The Customer Service Standards apply to every person or organization that has one or more employees in Ontario and that provides goods or services to the public or to other organizations (third parties).; For all organizations with 20 or more employees, there are documentation and reporting requirements as well. This Guide will address those requirements.

The Guide is based on the National Quality Institute's Progressive Excellence Program (NQI-PEP) [www.nqi.ca](http://www.nqi.ca) and is designed to assist organizations in a practical but innovative manner when implementing the AODA Customer Service Standards. It is based on a proven methodology of Planning, Implementation, and Sustainability.

The focus of the AODA Customer Service Standards is people with disabilities; however, following the NQI-PEP model is a great place to start the journey of achieving overall organizational excellence. Visit [www.peopleaccess.ca](http://www.peopleaccess.ca) for additional information.

***Please note: This document is for information purposes only.***

***This is not legal advice and should be read together with the official language of the Customer Service Standards of the AODA To view the official wording of the regulation, go to [www.elaws.gov.on.ca](http://www.elaws.gov.on.ca) and click on "Current Consolidated Law" to do a keyword search for "429/07". Or contact Service Ontario (listed below) to order a copy.***

*Accessibility for Ontarians with Disabilities Act 2005 (AODA)*

*Contact Centre (ServiceOntario)*

*Toll-free: 1-866-515-2025*

*TTY: 416-325-3408 / Toll free: 1-800-268-7095*

*Fax: 416-325-3407*

*Website: [www.accessON.ca](http://www.accessON.ca)*

## **Background and Objectives**

### ***Background***

The Ontario Government introduced the Accessibility for Ontarians with Disabilities Act, 2005 to make Ontario accessible for people with disabilities. This goal will be achieved by breaking down barriers to accessibility and by developing, implementing and enforcing accessibility standards.

### ***Why This Makes Good Sense***

About 1.85 million people in Ontario have a disability. That is one in seven people. Over the next 20 years as the population ages, the number will be one in five Ontarians. By 2025 the majority of people with disabilities will be older than 65. Today, 40% of Ontarians over the age of 65 have disabilities. Based on the principle of "six degrees of separation", all of us are theoretically connected to someone with a disability. In fact, studies have determined that 68% of Ontarians either have a disability or have a friend or loved-one with a disability.

### ***Objectives***

While the objective of the legislation is to make Ontario more accessible through compliance, the objective of this Guide is to assist you in building your own Accessibility Plan to achieve compliance.

### ***Principles***

The Customer Service Standards are based on a set of principles that are dignity, independence, integration, and equality of opportunity.

### ***What are barriers to accessibility?***

Barriers are obstacles that prevent people with disabilities from doing the kinds of things many of us do without thinking. Things like catching a bus, going to work or school, and buying groceries.

### ***What is a standard?***

A standard is an agreed-to way of doing something.

Accessibility standards are the rules that businesses and organizations in Ontario will have to follow to identify, remove, and prevent barriers to accessibility. The Standards were created by a committee comprised of people with disabilities, business groups, subject matter experts, and government. They have been subjected to public scrutiny and then revised, reviewed, and finalized for passage into law by the Minister of Community & Social Services.

Ontario has developed Accessibility Standards to help Ontarians with Disabilities in many

important areas of life, namely:

- **Customer Service Standards** – changing the attitudes of employees through education and clear organizational policies, practices, and procedures
- **Employment Standards** –accommodating people with disabilities to allow them to perform jobs for which they are trained, levelling the playing field and ensuring equal opportunities
- **Information and Communications Standards** – ensuring that telephone, internet, and other technological services are equally accessible by people with disabilities
- **Transportation Standards** – making it possible for people with disabilities to get where they need to go without undue physical or financial hardship
- **Built Environment Standards** (buildings and other structures) – integrated with the Building Code, these standards will ensure that architecture is designed and built to accommodate people with disabilities

**The Customer Service Standards became law in 2007, and all affected organizations must be compliant with them by January 1, 2012. The other Standards will have later dates to be compliant by.**

### *Who is a person with a disability?*

There are many kinds of disabilities. They can be visible, hidden, permanent, or occur only at certain times. Disabilities vary. Being hard of hearing is different from being deaf. Having low vision is different from being legally blind.

A disability can happen to anyone at any time. Some people are born with a disability. For others, the disability happens because of an illness or an accident. Sometimes it is because the person is getting older. In fact, as the population ages, many of us may eventually face some kind of limitation.

Types of disabilities:

- Deaf, deafened, or hard of hearing
- Deaf-Blind
- Intellectual
- Learning or Cognitive
- Mental Health
- Physical
- Speech Impediments
- Visual

For additional information, please refer to [www.peopleaccess.ca](http://www.peopleaccess.ca)

***Compliance Information***

Under the Customer Service Standards, organizations must do certain things to ensure accessibility for people with various kinds of disabilities.

Compliance to the Standards is mandatory and there are penalties for non-compliance. Every person who is guilty of an offence under this Act is liable on conviction:

- a) To a fine of not more than \$50,000 for each day or part of a day on which the offence occurs or continues to occur; or
- b) If the person is a corporation, to a fine of not more than \$100,000 for each day or part of a day on which the offence occurs or continues to occur

The deadlines for compliance are phased in over the next 15 years to give organizations time to implement the requirements of the standards. Visit the link [www.peopleaccess.ca](http://www.peopleaccess.ca) for more detailed information on when you must comply and penalties for non-compliance. The deadline for compliance with the Customer Service Standards is January 1, 2012.



## **How to Use This Guide**

This Guide gives you an easy-to-use, 3-Stage implementation approach using fill-in-the-blank templates.

Each Stage is broken down into Tasks.

Each Task includes:

- Task Objectives
- Things to think about to complete that Task
- How to Complete the Task
- Sample and blank templates for completing each Task

### ***STAGE 1 - Leadership Commitment and Planning:***

In the first Stage, you will build your action plan to achieve compliance.

### ***STAGE 2 - Implementation:***

Stage Two implements the plan created in Stage One – Leadership Commitment and Planning.

### ***STAGE 3 – Outcomes and Sustainability:***

This Stage guides you through the things to do to ensure that your Plan is sustainable and in compliance with the Standards.

During each Stage, you are documenting your actions using templates. The completed templates are the key components of your final plan.

## **STAGE 1 - LEADERSHIP COMMITMENT AND PLANNING**

Senior leadership commitment is the most important requirement in building the Plan to achieve compliance.

Senior leaders set the pace, tone and culture of the organization. To sustain an organization that embraces the principles of dignity, independence, integration, and equality of opportunity, the commitment to these principles must start at the top. Reinforcement of these principles is the responsibility of all levels of management.

Integrating the Customer Service Standards into day-to-day operations will require educating your staff about people with disabilities to change their attitudes and the way they interact with your customers.

When implementing any change to your organization successfully, leadership practices must include:

- visible, involved leadership providing clarity of direction
- following a disciplined approach
- communication
- commitment to training
- setting a example (walking the talk)
- allocation of resources

### **STAGE 1 TASKS to be completed for Leadership Commitment & Planning**

TASK 1: Identify Your Customer Touch Points

TASK 2: Identify the Barriers to Accessibility

TASK 3: Plan Actions to Address Barriers

TASK 4: Plan Approach to Serving People with Disabilities

TASK 5: Plan Internal Communications

TASK 6: Plan External Communications

TASK 7: Plan Training

TASK 8: Plan Customer Feedback

## **TASK 1: Identify Your Customer Touch Points**

### **Task Objective:**

A *customer touch point* is any time or place that a customer contacts, or is contacted by, your employees or interacts in any way with your company. The objective of this task is to identify the various ways that people interact with your organization. This is important because it is possible that not all of these customer touch points are accessible to people with disabilities today. This exercise will help you revise your policies, practices, and procedures in serving people with disabilities.

### **Things to Think About:**

Everything you do in your organization probably follows a number of steps that you do the same way each time, because you have found they work best. These are what we call processes. When you review your processes, look for customer touch points. As you write down your customer-facing processes and touch points, think about how a person with any disability might interact with you. Think about whom in your organization is at each customer touch point.

### **How to Complete this Task:**

- Review sample templates
- Invite participation from key functional areas of your business to help with this task
- Have a meeting to complete the template
- Identify your Key Processes – see a typical list on the sample template
- Identify the major sub processes – see a typical list on the sample template
- Identify how customers interact with you at each of these points
- Identify who is involved at each touch point

# Identify Customer Touch Points

## Overview

Key Processes	Major Sub-Processes	Customer Touch Points
<u><i>Step 1</i></u>	<u><i>Step 2</i></u>	<u><i>Step 3</i></u>
List your primary processes that involve customers	List the major step in each process	Note every touch point in each sub-process

## STEP 1

### List Your Primary Customer-Visible Processes

#### SAMPLE

<b>Key Processes</b>
<b>Marketing &amp; Advertising</b> (Finding out what customers want or need & attracting them)
<b>Selling</b> (Helping customers choose a product or service)
<b>Payment</b> (Billing or collecting money)
<b>Customer Support</b> (General inquiries, complaints, assistance)
<b>Delivery</b> (Getting the product or service into the hands of the customer)

## STEP 2

### List the Major Steps (sub-processes) in Each Key Process

#### SAMPLE

Key Processes	Sub Process
Marketing & Advertising	a) Create Marketing Strategy / Plan
	b) Create Marketing Materials
	c) Host Seminars, In-Store demonstrations, Community Home Shows
	d) Run direct mail campaign

### STEP 3

#### List Every Touch Point in Each Sub Process

#### SAMPLE

Key Processes	Sub Process	Touch Points
Marketing	a) Create Marketing Strategy / Plan	Telephone Research Surveys
	b) Create Marketing Materials	Focus Groups sharing video and audio clips
	c) Host Seminars, In-Store demonstrations, Community Home Shows	Face-to-face events with visuals, speakers, handouts
	d) Run direct mail campaign	Distribute reading material

## STEP 4

### List Who in your Organization Interfaces with these Customer Touch Points

#### SAMPLE

Key Processes	Sub Process	Touch Points	Employees / Groups at Touch Points
Marketing	a) Create Marketing Strategy / Plan	Telephone Research Surveys	i) Employees – marketing staff ii) Contracted Call Centre Agents
	b) Create Marketing Materials	Focus Groups sharing video and audio clips	i) Employees – marketing and product staff ii) P.R. Agency
	c) Host Seminars, In-Store demonstrations, Community Home Shows	Face-to-face events with visuals, speakers, handouts	i) Employees – product staff ii) Volunteers
	d) Run direct mail campaign	Distribute reading material	i) Advertising Agency



**STEPS 1,2,3,4**

**Identify Customer Touch Points**

**Blank Template**

Key Processes	Sub Process	Touch Points	Employees / Groups at Touch Points

## TASK 2: Identify the Barriers to Accessibility

### Task Objective:

Now that you have identified how and when customers interact with your business, you can start to identify what all of the potential barriers might be at these customer touch points.

### Things to Think About:

Barriers are obstacles that make shopping, going to a movie or taking public transit difficult, sometimes impossible, for people with disabilities.

The AODA defines a barrier as anything that stops a person with a disability from fully taking part in society because of that disability. Examples:

- Systemic barriers can occur through policies and procedures. These are any practices or rules that restrict people with disabilities - for example, denying access to a person with a service animal. **Systemic barriers are a focus of the Customer Service Standards.**
- Attitudinal barriers are perhaps the most difficult to overcome. Some people don't know how to communicate with those who have visible or non-visible disabilities or they discriminate against people with disabilities because of stereotypes. People may feel that they could offend the individual with a disability by offering help or they ignore or avoid people with disabilities altogether. **Addressing attitudinal barriers through employee education and training are a focus of the Customer Service Standards.**
- Physical or structural barriers such as the design of a building including stairs, doorways, the width of hallways and even room layouts. **The Built Environment Standard will address these kinds of barriers but you must consider these barriers and what alternate methods of accessibility you will provide as part of your Customer Service Policy.**
- Information and communications barriers for people to receive or convey information include small print size, low colour contrast between text and background, confusing design of printed materials and the use of language that is not clear or plain. **The Information and Communication Standards will address these kinds of barriers but you must consider these barriers and what alternate methods of accessibility you will provide as part of your Customer Service Policy.**

- Technological barriers can prevent people from accessing information. Everyday tools like computers, telephones and other aids can all present barriers. Conversely, the lack of a particular technology may create a barrier. **If these kinds of barriers exist within your organization, as part of your new or revised Customer Service Policy you must consider how you will help your customers work around these barriers until a future standard requires you to remove them, or you decide to remove them anyway.**

Although this Guide is focused on the Customer Service Standards, it is worth considering what other kinds of barriers may exist within your organization as these will have to be addressed for compliance with the future Standards of Employment, Information & Communication, Built Environment and Transportation.

**How to Complete this Task:**

- Review completed template from previous Task - Listing your Customer Touch Points
- Determine the barriers in your organization for every kind of disability for every touch point
- See Samples following
- Complete the Template with your own information

## STEP 1

### Identify Barriers to Accessibility at Customer Touch Points

#### SAMPLE

Key Processes	Sub Process	Customer Touch Points	Potential Barriers
Marketing & Advertising	a) Create Marketing Strategy / Plan	Telephone Research Surveys	Without use of TTY Relay Service or other assistive measure, barrier created for hearing impaired
	b) Create Marketing Materials	Focus Groups sharing video and audio clips	Without alternative methods to communicate with hearing/vision disabilities -barrier created  Possible Physical Access barriers exist
	c) Host Seminars, In-Store demonstrations, Community Home Shows	Face-to-face events with visuals, speakers, handouts	Without alternative methods to communicate with hearing/vision disabled -barrier created  Possible Physical Access barriers exist
	d) Run direct mail campaign	Distribute reading material	Barrier created if not enabled for people with vision disabilities

STEP 1

**Identify Barriers to Accessibility at Customer Touch Points**

**Blank Template**

Key Processes	Sub Process	Customer Touch Points	Potential Barriers

### **TASK 3: Plan Actions to Address Barriers**

#### ***Task Objective:***

Now that you have identified all of the barriers at all of your customer touch points, you need to identify the actions required to address these barriers. For example, your actions might include alternate or additional communication methods like a pad and pencil for a deaf person, and the inclusion of assistive devices on your premises such as a magnifying glass to read a menu. Essentially, these action plans help build your revised practices and procedures.

#### ***Things to Think About:***

As each person with a disability will have their own requirements, it is a good idea to use additional resources and collaborate with disability groups for the best, innovative solutions. Visit [www.nqi.ca](http://www.nqi.ca) for examples.

At a minimum, you must plan actions around the following:

- Assistive Measures including allowance of personal assistive devices, support persons, and service animals including how you will handle admission fees for support persons if applicable
- What to do if a person is having difficulty accessing your goods and services

#### ***How to Complete this Task:***

Review the following at [www.nqi.ca](http://www.nqi.ca)

- Welcoming People with Disabilities
- Tips to Making your Business more Accessible Video
- How We Help stories
- Accessibility Tools and Tips
- Communicating with People with Communication Disabilities
- Review the 5 sample documents following
  - *Planning for Support Persons*
  - *Planning for Service Animals*
  - *Planning Assistive Measures*
  - *Planning for What to do if a Person with a Disability is Having Difficulty Accessing Your Goods and Services*
  - *Plan Actions to Address Barriers at Customer Touch Points*

## STEP 1

### Planning for Support Persons

#### SAMPLE

Parts of Your Premise Open to the Public	Parts of Your Premise Open to 3 <sup>rd</sup> Parties (For example, Supplier Sales People or Delivery Personnel)
Retail Floor	Show Room
Special Situations	Your Alternative
Change room with space for one person only but individual requires their support person for assistance	Accommodation policy where the person with disability allowed to take clothing home and try on and return
When a person with a disability is required to agree to confidentiality or professional obligations of provider	Support person would also be obligated by same conditions if privy to all discussions

**STEP 1**

**Planning for Support Persons**

**Blank Template**

Parts of Your Premise Open to the Public	Parts of Your Premise Open to 3 <sup>rd</sup> Parties (For example, Supplier Sales People or Delivery Personnel)
Special Situations	Your Alternative



## STEP 2

### Planning for Service Animals

#### SAMPLE

Parts of Your Premise Open to Service Animals	Parts of Your Premise Open to Other 3 <sup>rd</sup> Parties
Areas open to the public where service animals must be permitted unless otherwise excluded by law – for example your retail floor	A showroom not open to the public but open to a retailer who purchases from you
Special Situations	Solution Example
You are serving two customers - one who has a service animal and another customer who is allergic	Determine the best way to serve and respect the needs of both customers. For example, discuss with both parties and determine best solution.
Where service animals are restricted by law	<ol style="list-style-type: none"><li>1. Explain why the service animal must be excluded</li><li>2. Bring goods or services to the person in a part of the premise where the animal is not excluded</li><li>3. Offering a safe location where the animal can wait and offering assistance to the person while separated from their animal</li></ol>
Some organizations have policies that do not allow pets. Hotels allowing pets but charging special deposits or additional fees	Simply put, Service Animals are not pets – they are working animals.

**STEP 2**

**Planning for Service Animals**

**Blank Template**

Parts of Your Premise Open to Service Animals	Parts of Your Premise Open to Other 3 <sup>rd</sup> Parties
Special Situations	Solution Example

### STEP 3

### Planning Assistive Measures

### SAMPLE

What Assistive <u>Devices</u> Will You Offer on Your Premises?	What Assistive <u>Services</u> Will You Offer on Your Premises?	What Alternative Service Methods Will You Offer on Your Premises?
Telecommunication devices	Sign language interpretation	Assistance of a staff person to complete a transaction
Telephones with large numbers	Oral interpretation	Home delivery of goods
Amplifiers	Real-time captioning	Delivery of goods or service in alternate location

**STEP 3**

**Planning Assistive Measures**

**Blank Template**

What Assistive Devices Will You Offer on Your Premises?	What Assistive Services Will You Offer on Your Premises?	What Alternative Service Methods Will You Offer on Your Premises?

## STEP 4

### Plan Actions for What to do if a Person with a Disability is Having Difficulty Accessing Your Goods and Services

#### SAMPLE

Issue	Who Addresses Issue	Action Plan
Too much background noise for those with hearing disabilities	Store Manager	Provide a private consultation room if applicable Lower music if applicable Equip staff with pens and paper
Aisles / Doorways too narrow for wheelchairs	Store Manager	Re-arrange merchandise creating wider aisles Alternate doorway entrance for wheelchairs
Signage unclear	Merchandise Manager	Ensure use of simple words, clear text
Lack of patience, courtesy, respect	Senior Leader	Lead by example, training and education

STEP 4

**Plan Actions for What to do if a Person with a Disability  
is Having Difficulty Accessing Your Goods and Services**

**Blank Template**

Issue	Who Addresses Issue	Action Plan

## STEP 5

### Plan Actions to Address Barriers at all Customer Touch Points

#### SAMPLE

Marketing Sub Process	Customer Touch Points	Potential Barriers	Ways to Address Barriers
Create Marketing Strategy / Plan	Telephone Research Surveys	Without use of Relay Service or other assistive measure, barrier created for hearing disabled	Offer mail-based or electronic survey alternative
Create Marketing Materials	Focus Groups sharing video and audio clips	Without alternative methods to communicate with hearing/vision disabled - barrier created  Possible Physical Access barriers exist	Provide full audio and visual coverage of materials Offer webinar-based alternative  Host at full access site
Host Seminars, In-Store demonstrations, Community Home Shows	Face-to-face events with visuals, speakers, handouts	Without alternative methods to communicate with hearing/vision disabled - barrier created  Possible Physical Access barriers exist	Provide full audio and visual coverage of materials Offer webinar-based alternative  Host at full access site

## STEP 5

### Plan Actions to Address Barriers at all Customer Touch Points

#### Blank Template

Sub Process	Customer Touch Points	Potential Barriers	Ways to Address Barriers



## TASK 4: Plan Approach to Serving People with Disabilities

### Task Objectives:

There are two objectives for this Task. The first is to determine your approach to implementing the accessibility standard and the second is to write the draft of your customer service policy to serving people with disabilities that addresses policies, practices, and procedures.

### Things to think about:

The primary consideration is how you are going to approach providing accessibility to people with disabilities.

Your approach may be stand-alone or integrated into existing customer service policies or a combination of both. It depends on what works best for your business. There may be a variety of ways to make your goods and services accessible.

### How to Complete this Task:

- Evaluate and determine what approach works best for your business
- Review *Plan Approach Sample* and *Draft Customer Service Policy Sample*
- Draft your customer service policy

### **Plan Approach –Plan Your Approach to Implementing the Standard - Example**

Scenario:		
As a small fashion retailer, you have a No>Returns Policy on clothing. However, your change rooms are very small and cannot accommodate a wheelchair or a support person. How would you offer an equal opportunity for a person with a physical disability to do business with you?		
Standalone Approach	Integrated Approach	Combination Approach
You decide for your business it makes sense to maintain a No>Returns Policy, but you do allow>Returns for people with disabilities who cannot try on clothing in your store.	You re-examine your>Returns Policy for all of your customers. You choose to revise your>Returns Policy and the same Policy applies to all customers.	You decide for the>Returns Policy you will go with a standalone approach, but you decide to use an integrated approach for other practices, such as Customer Carry Out being offered to all customers.

## STEP 1

### Plan Approach –Determine Your Decision Criteria to How You will Approach Developing Your Policies

#### SAMPLE

Decision Factors	Standalone	Integrated	Combination
Ease and speed of implementing policy changes	For certain policies, this approach may be the quickest and easiest to implement		
Cost to implement changes	For certain policies, this approach may be the most cost effective		
Sustainability of your policy change		This approach may be the best decision considering other impending standards	
Multiple Locations			Location Dependent

**STEP 1**

**Plan Approach**

**Blank Templates**

Determine Your Decision Criteria

Decision Factors	Standalone	Integrated	Combination

## STEP 2

### Draft Customer Service Standard Policy

#### Sample

<b>Customer Service Policy Statement - Sample</b>
You may choose to start with your overall Mission Statement
Consider including a statement of commitment that indicates that you strive to provide goods and services in a way that respects the dignity and independence of people with disabilities; that you are committed to giving people with disabilities the same opportunity to access your goods and services and allowing them to benefit from the same services, in the same place and in a similar way as other customers.
Include a statement on the alternate measures you will offer to ensure that persons with disabilities can obtain, use, or benefit from your goods and services if these measures are not integrated into the way you currently do business.  ü Identify what these alternate measures are that you decided to implement from <b><u>Plan Actions to Address Barriers.</u></b>
Include a statement on the use of personal assistive devices and a statement that your staff is trained on assistive devices that you decided to have on your premises in <b><u>Plan Actions to Address Barriers.</u></b>
Include a statement on the use of Service Animals, Support Persons and the handling of admission fees that you created in <b><u>Plan Actions to Address Barriers.</u></b>
Include a statement regarding how you will notify the public of temporary disruptions. <b><u>Plan External Communications</u></b>
Include a statement that describes your training plan for employees, volunteers, and contractors in how to interact with persons with disabilities and how training included your people involved in developing your policies, practices, and procedures for interacting with persons with disabilities. Talk about that you have trained your staff on what to do if a person with a disability is having difficulty accessing your goods and services. Indicate that you have

trained your staff on how to interact with people who use service animals or support persons. Describe that you have trained your staff to respect the purpose of the AODA and specifically your policies. Also, indicate that staff will be trained on an ongoing basis as revisions are made to policies and how long after hiring, new staff will be trained.

Refer to [Plan Actions to Address Barriers](#) and [Plan Training](#).

Indicate that you have a Communications Plan to share our Customer Service Standard Policies throughout our organization. Refer to [Plan Internal Communications](#)

Make a statement on how you will gather customer feedback, handle questions and modifications to your policies. [Refer to Plan Customer Feedback Process](#) and [Outcomes & Sustainability](#)

## STEP 2

### Draft Customer Service Standard Policy

#### Blank Template

<b>Customer Service Policy Statement - Template</b>
Your Mission Statement
Your statement of commitment to serving people with disabilities
Your alternate measures
Your policy regarding the use of Personal Assistive Devices
Your policy regarding Service Animals, Support Persons and the handling of admission fees (if applicable)
Your policy regarding how you will notify the public of temporary disruption of services.
Description of your training
How you share your Customer Service Policy internally
Your customer feedback process

## Customer Service Policy Template

This is a policy template on providing customer service to people with disabilities. You can use it to form the basis of your own policy or to give you ideas on what to include in your policy.

This sample policy template contains items that meet the requirements of the customer service standard, and also items that are not specifically required, but are good practices. Note that the policy may be revised as other standards are introduced under the Accessibility for Ontarians with Disabilities Act, 2005.

### **Customer Service Policy Statement:** Providing Goods and Services to People with Disabilities

#### **1. Our mission**

The mission of [insert name of provider] is to [insert mission of provider].

#### **2. Our commitment**

In fulfilling our mission, [insert name of provider] strives at all times to provide its goods and services in a way that respects the dignity and independence of people with disabilities. We are also committed to giving people with disabilities the same opportunity to access our goods and services and allowing them to benefit from the same services, in the same place and in a similar way as other customers.

#### **3. Providing goods and services to people with disabilities**

[insert name of provider] is committed to excellence in serving all customers including people with disabilities and we will carry out our functions and responsibilities in the following areas:

##### **3.1 Communication**

We will communicate with people with disabilities in ways that take into account their disability.

We will train staff who communicate with customers on how to interact and communicate with people with various types of disabilities.

##### **3.2 Telephone services**

We are committed to providing fully accessible telephone service to our customers. We will train staff to communicate with customers over the telephone in clear and plain language and to speak clearly and slowly.

We will offer to communicate with customers by [insert other means of communication that apply, e.g. e-mail, TTY, relay services] if telephone communication is not suitable to their communication needs or is not available.

### 3.3 Assistive devices

We are committed to serving people with disabilities who use assistive devices to obtain, use or benefit from our goods and services. We will ensure that our staff is trained and familiar with various assistive devices that may be used by customers with disabilities while accessing our goods or services.

We will also ensure that staff knows how to use the following assistive devices available on our premises for customers: [insert list of assistive devices available on premises].

### 3.4 Billing

We are committed to providing accessible invoices to all of our customers. For this reason, invoices will be provided in the following formats upon request: [insert formats, for example, hard copy, large print, e-mail, etc., in which provider will provide invoices].

We will answer any questions customers may have about the content of the invoice in person, by telephone or e-mail.

3.5 [Insert any other policies, practices or procedures the provider will establish that are specific to the nature of the goods and services offered].

## 4. Use of service animals and support persons

We are committed to welcoming people with disabilities who are accompanied by a service animal on the parts of our premises that are open to the public and other third parties. We will also ensure that all staff, volunteers and others dealing with the public are properly trained in how to interact with people with disabilities who are accompanied by a service animal.

We are committed to welcoming people with disabilities who are accompanied by a support person. Any person with a disability who is accompanied by a support person will be allowed to enter [insert name of provider]'s premises with his or her support person. At no time will a person with a disability who is accompanied by a support person be prevented from having access to his or her support person while on our premises.



[Fees will not be charged for support persons] or [insert amount] [will be charged to the support person] for admission to [insert name of provider]'s premises. Customers will be informed of this by a notice that will be posted in [insert name of provider]'s premises and [include any other means by which provider will notify customers of fee].

## **5. Notice of temporary disruption**

[Insert name of provider] will provide customers with notice in the event of a planned or unexpected disruption in the facilities or services usually used by people with disabilities. This notice will include information about the reason for the disruption, its anticipated duration, and a description of alternative facilities or services, if available.

The notice will be placed at all public entrances and service counters on our premises.

## **6. Training for staff**

[Insert name of provider] will provide training to all employees, volunteers and others who deal with the public or other third parties on their behalf, and all those who are involved in the development and approvals of customer service policies, practices and procedures. Individuals in the following positions will be trained:

[Insert list of positions that require training, for example, customer service representatives, sales associates, managers etc.]

This training will be provided [insert how long after hiring staff that training will be provided] after staff commence their duties.

Training will include the following:

- The purposes of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the customer service standard
- How to interact and communicate with people with various types of disabilities
- How to interact with people with disabilities who use an assistive device or require the assistance of a service animal or a support person
- How to use the [name equipment or devices , e.g. TTY, wheelchair lifts, etc., available on provider's premises or otherwise that may help with the provision of goods or services to people with disabilities]
- What to do if a person with a disability is having difficulty in accessing [Insert name of provider]'s goods and services
- [Insert name of provider]'s policies, practices and procedures relating to the customer service standard.

Applicable staff will be trained on policies, practices and procedures that affect the way goods and services are provided to people with disabilities. Staff will also be trained on an ongoing basis when changes are made to these policies, practices and procedures.

## **7. Feedback process**

The ultimate goal of [insert name of provider] is to meet and surpass customer expectations while serving customers with disabilities. Comments on our services regarding how well those expectations are being met are welcome and appreciated.

Feedback regarding the way [insert name of provider] provides goods and services to people with disabilities can be made by [insert the ways feedback can be provided, for example, e-mail, verbally, suggestion box, feedback card, etc.]. All feedback will be directed to [insert title of person responsible for receiving feedback]. Customers can expect to hear back in [indicate number of days].

Complaints will be addressed according to complaint categories already established in our company's complaint management procedures.

## **8. Modifications to this or other policies**

We are committed to developing customer service policies that respect and promote the dignity and independence of people with disabilities. Therefore, no changes will be made to this policy before considering the impact on people with disabilities.

Any policy of [insert name of provider] that does not respect and promote the dignity and independence of people with disabilities will be modified or removed.

## **9. Questions about this policy**

This policy exists to achieve service excellence to customers with disabilities. If anyone has a question about the policy, or if the purpose of a policy is not understood, an explanation should be provided by, or referred to, [insert title of supervising staff] of [insert name of provider].

## **TASK 5: Plan Internal Communications**

### ***Task Objectives:***

The objective of this Task is to plan your internal communications to ensure that your staff is informed of all your new or revised policies, practices, and procedures and how they support the accessibility initiative.

### ***Things to Think About:***

- Who the various groups are that you are communicating to, i.e. sales people, supervisors, volunteers
- Who will deliver the message
- What the message is

### ***How to Complete this Task:***

- Review sample document following

## STEP 1

### Plan Internal Communications

#### SAMPLE

Step	Person Responsible	Start Date	Target End Date
Develop communications plan for each group (who delivers what message to whom at what time via what method)	M. Collins	02/17/2011	03/17/2011
Create materials to support above plan (posters, videos)	J. Smith	02/15/2011	04/01/2011

#### Examples of what needs to be communicated:

- Actions to address barriers
- Policy

#### Training Plan

## STEP 1

### Plan Internal Communications

#### Blank Template

<b>Step</b>	<b>Person Responsible</b>	<b>Start Date</b>	<b>Target End Date</b>
Develop communications plan for each role group (who delivers what message to whom at what time via what method)			
Create materials to support above plan (posters, videos)			

## **TASK 6: Plan External Communications**

### ***Task Objectives:***

The objective of this Task is to plan your external communications to customers and the public to support the accessibility initiative.

You must communicate the following for compliance:

- Notifications to customers that Customer Service Standard documents are available on request
- Notifications regarding temporary disruption of services

Using a process to ensure that when releasing documents that the information is in a format that takes into account the person's disability (mandatory for compliance)

### ***How to Complete this Task:***

- Review How to Communicate with People with Communication Disabilities at [www.nqi.ca](http://www.nqi.ca)
- Review following sample

## STEP1

### Plan External Communications

#### SAMPLE

Step	Person Responsible	Start Date	Target End Date
Create notification message that Customer Service Standard documents are available on request	T. Binder	03/01/2011	03/07/2011
Create notification message regarding temporary disruption of services	T. Binder	<i>Sample Templates Follow</i>	
Plan methods/channels of communication that takes into account various disability types	J. Coutts		
Plan process to ensure when releasing documents that the information is in a format that takes into account the person's disability	T. Binder	03/15/2011	03/21/2011

## STEP 2

### Plan External Communications – Create Notice that Customer Service Standard Documents are Available on Request

#### SAMPLE

##### Sample Text

*The following could be posted on a website or in an establishment or otherwise made available by means that takes into account a person's disability.*

**(Name of Organization) is committed to making our goods and services accessible to everyone, including people with disabilities. We comply with the Customer Service Standard of the Accessibility for Ontarians with Disabilities Act (2005) and make notice that our Customer Service Standard Documents are Available on Request.**

**Please contact (phone, email address, web site)**

**Thank you.**

**Management**



### STEP 3

## Plan External Communications –Create Notification of Temporary Disruption of Services

### SAMPLE

#### **Sample Text**

**Dear Customers:**

**The east elevators will be out of service from April 1 to 15 for routine maintenance. To access the upper level of the shopping centre, please use the elevators at the west end of the building next to the food court. We regret any inconvenience this may cause. If you have questions or concerns, please call (phone number).**

**Thank you.**

**Management**

#### **Sample Text**

**Dear Guests:**

**Our accessible washroom is out of service due to a broken pipe. A repair person will be on the premises tomorrow to fix it. In the interim, we have made arrangements for our guests to use the accessible washroom at 123 Main Street, which is located next door to our premises. We apologize for any inconvenience.**

**Thank you.**

**Management**

## Plan External Communications – Things to think about

### Process to ensure that when releasing information a person's disability is taken into consideration

- Find out how a person wants to communicate with you by asking them.
- During Training you will have trained your staff on various disability types and the best methods of communication by disability type
- At this point, you must determine who within your organization will release information to the public – information such as your Customer Service Standard Policy, or Notices of Temporary Disruption
- Refer to the pre-determined channels and methods of communication that you will use for the distribution of various messages
- If posting information, where will you post it? Does this take into account a person's disability? *For example, consider posting a temporary disruption of an elevator at the car park or other points of entry to your building vs. only at the affected elevator. This way individuals may plan their routes to accessible services immediately upon their arrival to your building vs. travelling to an elevator, finding it unavailable, then having to redirect themselves to the other end of the facility.*

## STEP 4

### Plan External Communications

#### Blank Template

<b>Steps</b>	<b>Person Responsible</b>	<b>Start Date</b>	<b>Target End Date</b>
Create notification message that Customer Service Standard documents are available on request			
Create notification message regarding temporary disruption of services			
Plan methods/channels of communication that takes into account various disability types			
Plan process to ensure when releasing documents that the information is in a format that takes into account the person's disability			

**Plan External Communications – Create Notice that Customer Service Standard Documents are Available on Request – Template**

<b>Your Text</b>

**Plan External Communications –Create Notification of Temporary Disruption of Services – Template**

<b>Your Text</b>

## **TASK 7: Plan Training**

### **Task Objective:**

The purpose of this Task is to plan the Training for your employees, volunteers, contractors, or other third parties who interact with the public on your behalf. Training also includes any other people involved in developing policies, practices, and procedures for your organization such as Board Members.

### **Things to Think About:**

Now that you are ready to implement the solutions to the barriers that you have identified, the groups and people involved in customer interactions, and the timing of implementing these changes, you can now plan for Training. Refer back to your completed templates regarding your action plans to address barriers to help determine training content and audiences.

For compliance with the Standard, there are elements that must be addressed and these mandatory elements are highlighted in the Plan Training template.

Essentially, you need to plan who must be trained, the content of the training, format, and timing of the training. Are you going to train on minimum requirements or is this an opportunity for additional training in achieving excellence in customer service?

### **How to Complete this Task:**

- Review Sample document following

**STEP 1**

**Plan Training**

**SAMPLE**

<b>Steps</b>	<b>Person Responsible</b>	<b>Start Date</b>	<b>Target End Date</b>
Understand content, implementation dates for solutions to barriers & strategy			
Determine who needs to be trained			
Determine training content by role			
Develop training materials and delivery methods/schedule			

See detailed training plans on the following pages that address these tasks in detail.

## STEP 2

### Plan Training – Determine Content

#### SAMPLE

<b>Training Content</b> (these are mandatory elements as per the Standard)	<b>Person Responsible</b>	<b>What Roles Require this content</b>
Purpose of the Accessibility Act and the Customer Service Standard	J. Smith	All customer-facing and those developing policies
How to interact and communicate with people with various types of disabilities.	J. Smith	All customer-facing and those developing policies
How to interact with people with disabilities who use an assistive device, service animal or a support person	J. Smith	All customer-facing and those developing policies
How to use equipment or assistive devices available on your premises	J. Smith	All customer-facing and those developing policies
What to do if a person with a particular type of disability is having difficulty accessing your goods and services	J. Smith	All customer-facing and those developing policies
Your customer service policies, practices and procedures governing the provision of goods or services to people with disabilities	J. Smith	All customer-facing and those developing policies
Educate staff that your Customer Service Standard documents are available on request	J. Smith	All customer-facing and those developing policies
Specific things your team may need to be trained on by role	J. Smith	All customer-facing and those developing policies



### STEP 3

### Plan Training – Determine Attendees

### SAMPLE

<b>Who Needs to be Trained</b>	<b>Role</b>	<b>Employee</b>	<b>Volunteer</b>	<b>Contractor</b>
B. Jones	Retail clerk	yes		
K. West	Management	yes		
F. Smith	Event Greeter		yes	
P. Hunt	Telephone Researcher			yes
M. Kay	Delivery Person			yes

## STEP 4

### Plan Training – Develop or Source Training Material

#### SAMPLE

<b>Training Materials (Develop or Source)</b>	<b>Person Responsible</b>	<b>Start Date</b>	<b>Target End Date</b>
Source Videos and training materials from Disability Groups	K. Smith	05/01/2011	05/10/2011
Develop specific in-house requirements	L. Hunter	05/01/2011	05/10/2011
Outsource specific content development	L. Maitland	06/01/2011	06/30/2011

## STEP 5

### Plan Training – Develop Delivery Methods

#### SAMPLE

<b>Delivery Methods</b>	<b>Person Responsible</b>	<b>Call Centre</b>	<b>Retail Clerks</b>	<b>Delivery People</b>
Internet based training	J. Kay	ü		
Conference Calls	S. Binder		ü	
Face to Face	P. Smith		ü	ü
Other (Video)	L Maitland	ü	ü	ü

**STEP 6**

**Plan Training – Develop Delivery Schedule**

**SAMPLE**

<b>Location</b>	<b>Person Responsible</b>	<b>Date</b>
Mississauga	P. Colter	June 1, 2011
Newmarket	M. Myers	June 5, 2011
Brampton	M. Myers	June 10, 2011

## Plan Training

### Blank Template

<b>Steps</b>	<b>Person Responsible</b>	<b>Start Date</b>	<b>Target End Date</b>
Understand content, implementation dates for solutions to barriers & strategy			
Determine who needs to be trained			
Determine training content by role			
Develop training materials and delivery methods/schedule			

## **TASK 8: Plan Customer Feedback**

### ***Task Objective:***

The purpose of this task is to determine how you are going to capture customer feedback on how you are providing goods or services to people with disabilities and how you will respond to feedback, including complaints.

### ***Things to Think About:***

For compliance, your feedback process must allow people to provide feedback either in person, by telephone, in writing, by email, online, or by another method. It must specify what actions your organization will take when a complaint is received. You must also make information about your feedback process available to the public.

Although it is not mandatory for compliance to measure customer satisfaction, it is recommended as part of the PEP® methodology.

### ***How to Complete this Task:***

- Review following samples

## STEP 1

### Plan Customer Feedback

#### SAMPLE

How will you capture customer feedback?	In writing Email Website Telephone Feedback forms Other methods
How will you respond to Customer Feedback?	In writing Email Email Will you return calls? In writing, email, phone?
What information will you require from people when capturing feedback?	Name, address, phone, email? What location of your organization visited? When they interacted with you? Who they interacted with? Description of concern, compliment or suggestion
What actions will your employees take if a complaint is received?	Who will respond? Is that person able to take corrective action? When will they respond? Must they respond within a certain amount of time? How will they respond? Will you plan to respond in the same manner in which the complaint was received?
How will you make the public aware of your Customer Feedback process	This can be included in your policy statement. You may wish to post this notification in an obvious location.

## STEP 1

### Plan Customer Feedback

#### Blank Template

How will you capture customer feedback?	
How will you respond to Customer Feedback?	
What information will you require from people when capturing feedback?	
What actions will your employees take if a complaint is received?	
How will you make the public aware of your Customer Feedback process	



**STEP 2**

**Plan Customer Feedback –Measurements**

**SAMPLE**

How satisfaction measurement is captured.	When is it captured?	What does it Measure?
Customer Satisfaction Survey call	After the Sale	Overall customer satisfaction % satisfied / % dissatisfied

**STEP 2**

**Plan Customer Feedback –Measurements**

**Blank TEMPLATE**

How satisfaction measurement is captured.	When is it captured?	What does it Measure?

## **STAGE 2 - IMPLEMENTATION**

Implementation builds on the plan created in Stage 1 - Leadership Commitment and Planning, and implements the Project Plan.

## **TASK 1: Implement Internal Communications Plan**

### ***Task Objectives:***

The objective of this Task is to execute the internal Communications Plan.

### ***Things to Think About:***

Successful execution of the Internal Communications Plan sets the stage for everything else.

### ***How to Complete this Task:***

- Review sample document

## Implement Internal Communications Plan

### SAMPLE

Steps	Owner	Start Date	Target Completion Date	Actual Completion Date
Deliver messages as per Plan Communications Template	P. Jones	03/01/11	03/30/2011	03/23/2011

## Implement Internal Communications Plan

### Blank Template

Steps	Owner	Start Date	Target Completion Date	Actual Completion Date
Deliver messages as per Plan Communications Template				

## **TASK 2: Implement Training Plan**

### ***Task Objectives:***

It is now time to execute the Training Plan.

### ***Things to Think About:***

Effective training sets the stage for successful implementation of your actions that address accessibility barriers. Be innovative in your delivery; collaborate with disability groups. For training assistance please visit the Selectable Services Menu at [www.nqi.ca](http://www.nqi.ca)

### ***How to Complete this Task:***

- Review sample document following

## Implement Training

### SAMPLE

Deliver Training	Task Owner	Start Date	Target Completion Date	Actual Completion Date
Mississauga	T. White	04/15/2011	04/20/2011	04/22/2011
Newmarket	K. Bailey	05/01/2011	05/02/2011	05/01/2011
Training Log	# of Attendees	Name(s)	# Absent	Remainder to be Trained (By Name)
Mississauga	5	G. Stevens P. Jones K. Smith T. Binder M. Hanoun	0	0

## Implement Training

### Blank Template

Deliver Training	Task Owner	Start Date	Target Completion Date	Actual Completion Date
Training Log	# of Attendees	Name	# Absent	Remainder to be Trained By Name

### **TASK 3: Implement Actions that Address Barriers**

#### ***Task Objective:***

The purpose of this Task is to implement the solutions and actions planned in addressing barriers to accessibility.

#### ***Things to Think About:***

For compliance with the Standard, the actions regarding assistive devices, measures, and alternatives along with considerations for service animals and support persons must be implemented. However, this is an ideal opportunity to ensure that you have been innovative and inclusive in the design of your solutions to address barriers.

You have communicated with your people and you have trained your people – now it is time to implement the changes.

#### ***How to Complete Task:***

- Review sample document following



## Implement Actions to Address Barriers

### SAMPLE

Action Item	Owner	Start Date	Target Completion Date	Actual Completion Date
Provide full audio and visual coverage of materials	K. West	05/15/11	05/30/2011	06/10/2011

## Implement Actions to Address Barriers

### Blank Template

Action Item	Owner	Start Date	Target Completion Date	Actual Completion Date

## **TASK 4: Implement External Communications Plan and Your Revised Customer Service Standard Policy**

### ***Task Objectives:***

The objective of this task is to implement your external communications plan and put into action your revised policies, practices and procedures - which form your revised Customer Service Policy.

### ***Things to Think About:***

Planning is complete, training has occurred, changes are made - now it is time to implement your new and revised Customer Service Standard Policy and the external communication requirements that support your Policy. This is also the time to validate that your revised policies, practices, and procedures are in alignment with the core Customer Service Standard principles of dignity, independence, integration, and equality of opportunity.

### ***How to Complete this Task:***

- Review sample documents following
- Refer to the Compliance Manual: Accessibility Standards for Customer Service, Ontario Regulation 429/07 which can be found via [www.nqi.ca](http://www.nqi.ca)

## Implement External Communications and Your Revised Customer Service Policy

### SAMPLE

<b>Customer Service Policy Statement</b>
You may choose to start by referring to the Mission statement of your organization.
Include the thinking that you created in <b><u>Plan Approach</u></b> that indicates that you strive to provide goods and services in a way that respects the dignity and independence of people with disabilities. That you are committed to giving people with disabilities the same opportunity to access your goods and services and allowing them to benefit from the same services, in the same place and in a similar way as other customers.
Include a statement on the alternate measures you will offer to ensure that persons with disabilities can obtain, use or benefit from your goods and services if these measures are not integrated into the way you currently do business.  ü Identify what these alternate measures are that you decided to implement from <b><u>Plan Actions to Address Barriers</u></b> .
Include a statement on the use of personal assistive devices and a statement that your staff is trained on assistive devices that you decided to have on your premises in <b><u>Plan Actions to Address Barriers</u></b> .
Include a statement on the use of Service Animals, Support Persons and the handling of admission fees that you created in <b><u>Plan Actions to Address Barriers</u></b> .
Include a statement regarding how you will notify the public of temporary disruptions. <b><u>Plan External Communications</u></b>
Include a statement that describes your training plan for employees, volunteers, and contractors in how to interact with persons with disabilities and how training included your people involved in developing your policies, practices and procedures for interacting with persons with disabilities. Talk about that you have trained your staff on what to do if a person with a disability is having difficulty accessing your goods and services. Indicate that you have trained your staff on how to interact with people who use service animals or support persons.

Describe that you have trained your staff with respect to the purpose of the AODA and specifically your policies. Also indicate that staff will be trained on an ongoing basis as revisions are made to policies and how long after hiring, new staff will be trained.

Refer to **Plan Actions to Address Barriers** and **Plan Training**.

Indicate you have a Communications Plan to share our Customer Service Standard Policies throughout our organization. Refer to **Plan External Communications**.

Make a statement on how you will gather customer feedback, handle questions and modifications to your policies. **Refer to Plan Customer Feedback Process**

## **TASK 5: Implement Customer Feedback Process**

### ***Task Objectives:***

This Task puts into action your plan for capturing customer feedback.

### ***Things to Think About:***

Now that you have created or revised your Customer Service Standard policy, it is time to proceed with implementing your Customer Feedback Process. Have you taken into consideration the various communications requirements for people with different disabilities if you are using a Comment Form? Have you instituted the management system that will ensure feedback is reviewed? Does the management system ensure that changes and improvements can be made to your policies, practices, and procedures based on feedback?

### ***How to Complete this Task:***

- Review sample document following

## Implement Customer Feedback Process

### SAMPLE

Action Item	Owner	Start Date	Target Completion Date	Actual Completion Date
Customer Feedback notification issued to the public in the ways determined during Plan Customer Feedback	K. Smith	09/01/2011	09/01/2011	09/01/2011

## Implement Customer Feedback Process

### Blank Template

Action Item	Owner	Start Date	Target Completion Date	Actual Completion Date
Customer Feedback notification issued to the public in the ways determined during Plan Customer Feedback				

## **STAGE 3 - OUTCOMES AND SUSTAINABILITY**

The objective of a well-planned implementation approach is to assure sustainable change embedded into the organization.

The Customer Service Standard is the first of the Accessibility Standards that your organization will be implementing throughout 2025.

An inclusive design for the first Standard sets up a solid, sustainable foundation for the other standards. (Employment, Information and Communications, Public Transportation (if applicable) and Built Environment)

The Sustainability Process steps include

- Sustaining Change through a Continuous Improvement Process
- Filing your Accessibility Report



## **TASK 1: Sustain Change through Continuous Improvement Process - OPTIONAL**

### ***Task Objectives:***

The objective of this Task is to ensure that both corrective and preventative improvement actions identified internally and through customer feedback are captured, identified, and acted upon. The process ensures ongoing focus on customer service for people with disabilities.

### ***Things to Think About:***

Refer to the Task - Plan Continuous Improvement Process.

### ***How to Complete this Task:***

- Review sample document following

## Sustain Change through Continuous Improvement Process

### SAMPLE

Task	Owner	Start Date	Planned Completion
Aggregation of Customer Feedback	J. Smith	1 <sup>st</sup> Week of quarter	Within 1 week
Analysis and Review of Feedback		1 <sup>st</sup> Week of quarter	Within 1 week
Identify Common Threads and Root Causes		Quarterly	Within 2 weeks
Determine if additional input needed – example focus groups, research		As needed	Variable
Develop Recommendations		Quarterly	For sr. leaders
Review Recommendations with Senior Leaders and gain agreement on action required		Quarterly	Schedule recurring meetings with senior leaders
Implement changes into Organizt'n		As soon as training Communication is done	
Make necessary adjustments to Policies, Practices, Procedures		As soon as identified	Variable
Internal Communication re change		With policy change	variable
External communications re changes		With policy change	variable
Retrain as necessary		Significant policy change or new hire on board	Variable

## Sustain Change through Implementing a Continuous Improvement Process

### Blank Template – OPTIONAL

Task	Owner	Start Date	Planned Completion
Aggregation of Customer Feedback			
Analysis and Review of Feedback			
Identify Common Threads and Root Causes			
Determine if additional input needed – example focus groups, research			
Develop Recommendations			

## **TASK 2: File Your Accessibility Report**

### ***Task Objectives:***

**THIS TASK MUST BE COMPLETED TO ACHIEVE COMPLIANCE for COMPANIES WITH GREATER THAN 20 EMPLOYEES**

The objective of this Task is to ensure that private sector companies with greater than 20 employees understand the document requirements for compliance with the Standard.

By following this Guide, all of the documents should have been created.

### ***Things to Think About:***

To meet the requirements, you will need to prepare the documents and have a way to let the public know about the documents and be able to provide the documents by the following date:

- January 1, 2012, for companies with 20 or more employees

You will have to file annual online accessibility reports with the Accessibility Directorate of Ontario by

- **2012** (month and day still to be determined), for companies with 20 or more employees

**Steps to Complete this Task:**

Review the following government checklist for filing your report.

**Accessibility Report on the Customer Service Standard**

These are the questions for the accessibility report on the Accessibility Standards for Customer Service.

Each question includes a reference to the corresponding section of the standard.

<b>1. a)</b> Does your organization have policies, practices and procedures on providing goods or services to people with disabilities? [s. 3(1)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>1. b)</b> Does your organization use reasonable efforts to ensure that these policies are consistent with the principles of independence, dignity, integration and equality of opportunity? [s.3(2)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>2.</b> Do your organization's policies address the use of assistive devices by people with disabilities to access your organization's goods or services, or any available alternative measures that enable them to do so? [s. 3(3)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>3.</b> Do your organization's policies, practices and procedures require your organization to take a person's disability into account when communicating with the person? [s. 3(4)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>4.</b> Do members of the public or other third parties have access to premises that your organization owns or operates? [s. 4(1)] If no, then skip to question 7 below.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>5. a)</b> Does your organization permit people with disabilities to keep their service animals with them on the parts of your premises that are open to the public or other third parties, except where the animal is excluded by law, and is this included in your policies, practices and procedures? [s. 4(2) & (7)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>5. b)</b> If a service animal is excluded by law from your premises, does your organization ensure that alternate measures are available to enable the person to access your goods or services (s.4.(3)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>6.</b> Does your organization permit people with disabilities to enter the parts of your premises that are open to the public or other third parties with their support person, and provide notice of any fee charged for the support person, and is this included in your policies, practices and procedures? [s. 4(4) (6) & (7)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>7.</b> Does your organization post a notice at a conspicuous place on your premises, on your website, or by another reasonable method, of any temporary disruption in facilities or services that people with	Yes <input type="checkbox"/>	No <input type="checkbox"/>

disabilities usually use to access your organization's goods or services, including the reason, duration and any alternatives available? [s. 5(1) (2) & (3)]		
<b>8.</b> Has your organization established and documented a process to receive and respond to feedback on how its goods or services are provided to people with disabilities, including actions that your organization will take when a complaint is received? [s. 7(1), (3) & (4)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>9.</b> Does your organization make information about its feedback process readily available to the public, including how feedback may be provided (e.g. in person, by telephone, in writing, by email, on diskette or otherwise)? [s. 7(1) & (2)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>10.</b> Does your organization ensure that the following people receive training about providing your goods or services to people with disabilities:  <ul style="list-style-type: none"> <li>§ every person who deals with the public or other third parties on behalf of your organization, and</li> <li>§ every person who participates in developing your organization's policies, practices and procedures on providing goods or services? [s. 6(1)]</li> </ul>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>11.</b> Does this training include your organization's current policies, practices and procedures required under the Customer Service Standard and all the topics listed in section 6(2) of the standard? [s. 6(2) & (4)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>12.</b> Does your organization have a written training policy that includes a summary of the contents of the training (per question 11 above) and details of when the training is to be provided, and does your organization keep records of the dates that training was provided and how many people were trained? [s. 6(5) & (6)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<b>13.</b> Does your organization post a notice at a conspicuous place on your premises, on your website, or by another reasonable method, that the documents required by the Customer Service Standard are available upon request, and do you provide those documents in a format that takes a person's disability into account? [s. 8(1) & (2) & 9(1)]	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Refer to: Accessibility Report for the Customer Service Standard – Ministry of Community and Social Services via [www.peopleaccess.ca](http://www.peopleaccess.ca)