

Customer Service Policy

Accessibility for Persons with Disabilities

1. Our Mission

The mission of the Insurance Institute is to enable all people employed in the financial services businesses to achieve their performance potential and maximize their intellectual development.

2. Our Vision

To be recognized as the premier provider and authority on professional development within the property and casualty insurance industry and establish a strategic presence in the related financial services sector.

3. Our Commitment

In fulfilling our mission, the Insurance Institute is committed to providing its goods and services in a way that respects the dignity and independence of persons with disabilities. We are also committed to giving persons with disabilities the same opportunity to access our materials and services and allowing them to benefit from the same services, in the same place and in a similar way as other customers.

4. Providing Goods and Services To Persons With Disabilities

The Insurance Institute is committed to excellence in serving all customers including members with disabilities and we will carry out our functions and responsibilities in the following areas:

Communication

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

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

Telephone Services

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

We will offer to communicate with members by email if telephone communication is not suitable to their communication needs or is not available.

Assistive Devices

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

Billing

We are committed to providing accessible invoices to all our members. For this reason, invoices will be provided in the following formats upon request: hardcopy, email, large print. We will answer any questions members may have about the content of the invoice, by telephone or email

5. Use of Service Animals and Support Persons

We are committed to welcoming members 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 ensure that all staff, volunteers and others dealing with the public are properly trained in how to interact with members with disabilities who are accompanied by a service animal. In the event an Institute staff member or Institute member is allergic to animals, alternative arrangements will be negotiated.

We are committed to welcoming members with disabilities who are accompanied by a support person. Any member with a disability who is accompanied by a support person will be allowed to enter the Insurance Institute premises with his or her support person. At no time will a member 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.

6. Notice of Temporary Disruption

The Insurance Institute will make reasonable effort to provide members with notice in the event of a disruption in the facilities or services usually used by members 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. We will not be able to give adequate notice in case of an emergency temporary disruption.

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

7. Training for Staff

The Insurance Institute will ensure that all persons to whom this policy applies receive training as soon as practicable and as required by the Accessibility Standards for Customer Service. In addition, training will be provided to Insurance Institute employees as part of orientation training for new employees and on a continuing basis as required. The amount and format of training will depend on the person's interaction with customers.

Individuals In The Following Positions Will Be Trained:

Customer Service Representatives, Management staff, Print and Fulfillment staff and any other staff who deal with any aspect of member servicing or relations. In addition, volunteers who interact with members will receive required training; the amount and format dependent on the person's interaction with members.

Training Will Include The Following:

- The purpose of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the customer service standard
- How to interact and communicate with members with various types of disabilities
- How to interact with members with disabilities who use an assistive device or require the assistance of a service animal or a support person
- What to do if a member with a disability is having difficulty in accessing the Insurance Institute's goods and services
- The Insurance Institute's policies, procedures and practices relating to the customer service standard

A record of training received by Institute staff will be kept in the Institute Human Resources Department.

8. Feedback Process

The ultimate goal of the Insurance Institute is to meet the needs and exceed customer expectations including members with disabilities. Comments on our services regarding how well those expectations are being met are welcome and appreciated.

Members can submit feedback to the Senior Director of Human Resource. Alternatively, members can submit feedback to any Institute employee and it will be forwarded to the appropriate person for review and as applicable, response.

Feedback may be submitted in writing or verbally to:

Senior Director of Human Resources
18 King St. E., 6th Floor
Toronto, Ontario, M5C1C4
Phone 416 362 8586

9. 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 persons with disabilities.

Any policy of the Insurance Institute that does not respect and promote the dignity and independence of people with disabilities will be modified or removed.

10. Questions about this Policy

This policy exists to provide a framework through which the Insurance Institute can achieve service excellence for people with disabilities. If anyone has a question about the policy, or if the purpose of the policy is not understood, please contact:

Senior Director, Human Resources
Insurance Institute of Canada
18 King St E., 6th Floor Toronto,
Ontario
M5C 1C4

Phone: 416 362 8586



Insurance Institute

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