



## *Accessibility Standards for Customer Service Training*

Leader Guide

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## Workshop Overview

### Workshop Objectives

This guide presents a workshop on the topic of accessible customer service to persons of all ability levels. The goal of the workshop is to raise employees' (participants') awareness with respect to key issues related to the topic of accessible customer service, disabilities and the challenges they pose. Workshop objectives include:

- Techniques that can help increase awareness of the main types of disabilities and the challenges they pose for customers.
- Requirements of company's under the *Accessibility for Ontarians with Disabilities Act* (AODA) for setting policies in place, etc.
- Potential legal ramifications of not providing accessible customer service.

### How to Use the Leader Guide

This guide is intended to be used by the workshop leader(s) and should not be distributed to participants. It includes instructions for organizing and running a successful workshop.

It is recommended that all workshop leaders become familiar with all material related to this workshop, including the Leader Guide, Participant Guide, video DVD presentation, and bonus PowerPoint Presentation. The guide is indexed so that the workshop leader can refer to corresponding material in the participant guide.

This guide includes discussion notes on the topic of providing accessible customer service to persons of all ability levels; however, the workshop leader should have broader background knowledge on the topic. To provide that background, a bibliography of suggested reading and websites is included with this guide. It is strongly recommended that the workshop leader review all of this material.

### Workshop Design

The workshop offers the following features:

- Experiential learning that concentrates on developing knowledge and abilities through the experiences of the participants;
- Practical techniques that can be used on the job;
- The encouragement of learning from the knowledge and experiences of the workshop leader(s) and participants;
- A participant guide that provides reference material based on workshop concepts and techniques;

- An AODA PowerPoint presentation that can be shown as a stand-alone teaching aid;
- The AODA 15-minute video DVD that can be shown as an introduction to, or to further emphasize workshop content.

The workshop can also be extended by including a lesson on rolling out the employer's AODA policy. See *How to Customize the Workshop* for further information.

### **Optional PowerPoint Presentation**

To use the PowerPoint presentation included with this kit, you will need:

- A computer with PowerPoint or a PowerPoint viewer installed
- A projector connected to the computer being used for the training session

*Note: It is important to test the functionality of your equipment before using the presentation to prevent delays.*

### **How to Customize the Workshop**

Customizing the workshop greatly enhances its value to participants. The following suggestions may be helpful:

- Before conducting the workshop, obtain information about the organization and the participants, their jobs and any specific human rights issues that they face;
- Consult colleagues about human rights issues to help build a larger base of knowledge and understanding of the topic;
- Customize the participant guide for the organization and the particular participants attending;
- Alter the workshop outline and/or timing to reflect the needs of the audience. Use examples to which the audience can relate; and
- If it seems useful and time permits, allow discussion to continue beyond the recommended time frame. Always remember to process each activity thoroughly as it is important that participants are able to fully experience each activity.

A short video can provide an additional form of learning and be an effective change of pace from the experiential learning on which the remainder of the workshop is based. It is suggested that the video DVD be inserted after a 15-minute break and before Lesson 7.

The workshop can also be customized to include training on the employer's AODA policy. This optional step is best done in Lesson 5.



There are two suggested agenda options outlined in the Suggested Agendas section of this document which can be adjusted to suit the needs of the group and workshop leader.

There are further tips for compressing the workshops contained in each of the lessons.

### Guide Format and Intent

The workshop presented in this guide highlights the major areas of providing accessible customer service for people with disabilities in the workplace. This guide is divided into four parts:

Title	Description
Part I - Workshop Overview	Provides an overview of the workshop design, workshop preparation instructions, evaluations techniques and tips to lead the session.
Part II - Introduction Workshop Activities	Provides the following: <ul style="list-style-type: none"> <li>• Detailed instructions on how to conduct each of the workshop activities</li> <li>• All reference materials required to explain activities and to conduct lectures</li> <li>• 15-minute video DVD</li> <li>• All associated participant handouts, and PowerPoint presentation</li> </ul>
Part III - Glossary of Terms	Provides a glossary of relevant topic-specific terms.
Part IV - Participant Guide	Provides workshop reference materials for reproduction and distribution to participants.

Although the workshop is complete, the design is flexible and can be customized to various groups and time frames. Its primary focus is to provide an environment that promotes learning through experience and encourages the transfer of these experiences and knowledge to the job.

## Workshop Activity Outline

The workshop activities presented in Part II are divided into 11 lessons:

Lesson	Title	Description
1	Workshop Orientation	Sets out the framework of the workshop, discusses the workshop objectives and agenda, describes responsibilities, and provides an opportunity for an icebreaker or group activity and the participants to identify their workshop expectations.
2	Introduction	Participants will gain a general overview of the legal significance of the <i>Accessibility for Ontarians with Disabilities Act</i> and the requirements of the employer.
3	Summary of Requirements of the Accessible Customer Service Standard	Participants will be introduced to the Accessible Customer Service Standard and the requirements that apply to all providers offering goods and services either directly to the public or to other organizations in Ontario, and the additional requirements for organizations with more than 20 employees.
4	Why It's Important	Participants will examine the financial, lack of opportunities, and infraction factors if accessible customer service is not provided in an organization.
5	Responsibilities and Liabilities	Participants will learn the responsibilities or liabilities under Canadian law for employers, management, and workers, and the actions required of them.
6	Definition of Workplace	Participants will be challenged to extend their perception of the typical boundaries considered for a workplace to provide if possible a barrier-free experience for disabled customers.
7	Definition of Disabilities	Participants will learn the definition of disabilities under the AODA and the OHRC.
8	Serving People with Disabilities	Participants will examine general service tips, how to choose the right word when talking to or about people with disabilities, and in which manner to recognize and respond.
9	Support for People with	Participants will examine the support options available

	Disabilities	for people with disabilities to fully integrate and participate in society with use of service animals, support persons, personal assistive devices, etc.
10	Understanding the Universal Symbols of Accessibility	Participants will be shown the various symbols associated with disabilities and the definition of each.
11	Wrap-up and Evaluation	Provides an opportunity to summarize workshop contents, answer participant's questions, and distribute handouts, including course evaluation sheet.

### Target Audience

This workshop is intended for all participants to understand the legal aspect of ensuring accessibility to persons of all ability levels, the main types of disabilities, and how to interact with people with disabilities. The course content within this workshop is a general overview and can be used for annual retraining of employees and for new hires. Ideal classroom size for Instructor-led training is no more than 25 participants.

### Workshop Preparation

#### Contacting Participants

Participants should be notified of the following information well ahead of the scheduled workshop date:

- Workshop leader's name and position or trainer's name and professional history;
- Workshop location;
- Date(s) and times;
- Workshop goals and objectives; and
- A brief outline of the topics to be covered.

Participants should also be advised the workshop is based on an experiential learning model and will involve active participation of the group. They will be encouraged to work with new ideas and approaches and will be given an opportunity to practice what they have learned. (Refer to document – Workshop Details and Agenda)

## **Location Requirements, Materials and Equipment**

It is important to choose a location that has access to the following:

- Ample wall space for posting group information (optional)
- Space that can accommodate a number of round tables and chairs
- Extra tables for workshop leader materials
- Refreshments
- Laptop with media player
- Audio/visual equipment including overhead projector and projection system

All of the activities in Part II specify the materials that are required for each activity.

The Preparation Checklist on the following page lists the materials and equipment required for the workshop. Other equipment and materials not itemized may be necessary if the workshop leader alters the workshop design.

The workshop leader should arrive early to allow sufficient time for workshop preparation and set-up including checking materials, arranging the room and ensuring that equipment is functioning properly.

### Preparation Checklist

1. AODA Leader Guide \_\_\_\_\_
  2. Reproduced Participant Guide(s) \_\_\_\_\_
  3. Workshop Sign-in Sheet \_\_\_\_\_
  4. Evaluation/Feedback Forms \_\_\_\_\_
  5. AODA video DVD \_\_\_\_\_
  6. Overheads/PowerPoint Presentation \_\_\_\_\_
  7. Computer and projection system \_\_\_\_\_  
*If using PowerPoint presentation and/or video<sup>1</sup>*
  8. Participant Name tags \_\_\_\_\_
  9. Two or more newsprint flipcharts (Optional) \_\_\_\_\_
  10. At least one flipchart easel (Optional) \_\_\_\_\_
  11. Two packages of non-bleeding felt markers (Optional) \_\_\_\_\_
  12. Masking tape (Optional) \_\_\_\_\_
  13. Prepared flipcharts for activity instructions and workshop orientation (Optional) \_\_\_\_\_
  14. A watch or clock for timing activities \_\_\_\_\_
  15. Refreshments for breaks (if appropriate) \_\_\_\_\_
  16. Water and glasses on tables \_\_\_\_\_
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<sup>1</sup> Note that PowerPoint/DVD software or viewer/media player must be installed on the presentation computer.

## Suggested Agendas

### Option 1:

This material can be used as part of an employee orientation.

You will note that there are 2 options on the video menu, one of which includes built-in quizzes. Use this version to show to all of your new hires. It is therefore non-instructional. They can go through the video at their computer, at their own pace. If they get a quiz question wrong, they will be automatically taken back to the portion of the program that covers that material. In other words, they cannot move on to the next section until they have successfully completed the section they are working on.

The video is approximately 15 minutes in duration. The employer should have the employee read and sign-off on their related policies at that time.

### Option 2:

The material can be used as a workshop format and can be made interactive by showing the video with built-in quizzes and having participants volunteer the answers.

Or, the video can be shown straight through and the quiz completed at the end.

To make the workshop more experiential, the workshop leader could use examples from their workplace to lead a discussion on how to best meet customer service issues. Each workplace is unique, and brings different challenges when dealing with members of the public with disabilities.

The following agenda is provided as an example, and should be modified to fit the individual needs of the group. Participants should be provided with an agenda approximately one week prior to the workshop.

### AODA

**September XX, 20XX**

**Boardroom A, ABC Company**

(Half-Day Version)

Description	Estimated Time Requirement
<b>Lesson 1</b> – Orientation	8:30 to 8:45

<b>Lesson 2</b> – Introduction	8:45 to 8:55
<b>Lesson 3</b> – Summary of Requirements of the Accessible Customer Service Standard	8:55 to 9:15
<b>Lesson 4</b> – Why It’s Important	9:15 to 9:35
<b>Lesson 5</b> – Responsibilities and Liabilities	9:35 to 9:50
<b>Lesson 6</b> – Definition of Workplace	9:50 to 10:00
<i>Break</i>	10:00 to 10:15
<b>Video</b>	10:15 to 10:45
<b>Lesson 7</b> – Definition of Disability	10:45 to 11:00
<b>Lesson 8</b> – Serving People with Disabilities	11:00 to 11:15
<b>Lesson 9</b> – Support for People with Disabilities	11:15 to 11:30
<b>Lesson 10</b> – Understanding the Universal Symbols of Accessibility	11:30 to 11:45
<b>Lesson 11</b> – Wrap Up and Evaluation	11:45 to 12:00

**TOTAL****3.5 Hours**

### Workshop Training Records

Keeping accurate training records for your employees will enable the effective running of your business or organization. This information can assist you with recruitment and training, performance reviews, and career advancement.

Training records also play an increasingly important part in helping you to pass third party audits or inspections. You may be audited by your customers, or by a recognized organization such as the Ministry of Labour. These organizations will expect your company’s records to comply with their inspection criteria.

Training records should include at a minimum the following:

- Employee name, department
- What training was provided for each competency level across each skill?
- When and where was this training, skill and knowledge provided?
- Proof and evidence of employee's competence level(s), including statements of compliance and sign-off sheets if required
- Copy of the completion certificate retained in the employee's file

## Measuring the Effectiveness of the Workshop

### Measuring Participant Learning During the Workshop Session

Participant learning will be measured at the conclusion of the session and will be evaluated by peers and self.

### Using the Evaluation/Feedback Form

The Evaluation/Feedback Form measures participants' response to various elements of the workshop including workshop location, content, workshop leader, and activities.

### Measuring Participants Learning After the Workshop Session

While the Evaluation/Feedback Form gives participants an opportunity to comment on elements of the workshop, it does not provide the employer or the workshop leader with any indication of whether or not what has been learned is actually being applied in the workplace.

The following are some suggested ways in which the workshop leader and/or the employer can measure or evaluate the transfer of learning from the workshop to the workplace.

Transfer of learning can be measured by:

- Observation
- Follow-up interviews
- Questionnaires

Sources of the above information may include:

- Workshop participants
- Participants' supervisor(s)
- Persons who interact with workshop participants on the job



## Time Frame

The evaluation of transfer of learning to the workplace usually is completed six weeks to six months after the workshop.

## Workshop Facilitator Tips

A good workshop leader contributes both process and structure to group interactions. A workshop leader assists and enables the group by providing support in functioning effectively.

The following tips will help you prepare for and facilitate this session.

1. **Know the participants.** Gather as much information as you can about the participants and the organization.
2. **Stay neutral.** Focus on the process. Use questions and suggestions to offer ideas but do not impose opinions on the group.
3. **Active listening.** Use active listening skills to facilitate group participation.
4. **Paraphrase.** Use paraphrasing to clarify and reinforce ideas.
5. **Ask questions.** Effective questioning can invite participation, gather and probe for information. This is your most important tool.
6. **Provide participants with meaningful feedback.**
7. **Use a flipchart.** The flipchart is an effective tool for ensuring that participant ideas are documented completely and accurately.
8. **Keep time.** Time guidelines have been established for each lesson and activity. Enforcing time guidelines keeps the group focused.
9. **Redirect.** When you are asked a question, redirect it to another participant to get an answer. This stimulates group interaction.
10. **Clarify assumptions.** Participant assumptions should be understood and sometimes challenged by the group.
11. **Build on ideas.** Don't just record individual ideas; get participants to build on each other's comments and ideas so that the recorded points represent the collective thinking of the group.
12. **Have the group evaluate the process.** Tell the group how they look to you and ask them how they think they are doing. Have participants interpret their own and each other's actions as well as provide solutions to problems when necessary.
13. **Summarize.** Workshop leaders summarize to start, revive and to end a discussion.

14. **Let the group decide whether to pursue sidetracks.** Let the group know when they are off track. They should decide whether to pursue the discussion or get back to the agenda (with consideration for timing).
15. **Use a parking lot.** Record questions and sidetracks for further discussion or other agendas on flipchart and post.
16. **Process each activity thoroughly.** It is important that participants are able to fully experience each activity.
17. **Practice, practice, practice!**

## Workshop Orientation

Timing:  
15 Minutes

### Introduction

Workshop leader introduces self and provides a brief outline of his or her background.



### Icebreaker

#### Option 1:

Workshop leader asks participants to introduce themselves using an alliterative adjective such as, "I am jumpy Jane." The next person repeats the previous person's name and adds his/her own alliterative name.

The exercise continues with each person repeating each person's name that was said before until all participants have been introduced.

#### Option 2:

Workshop leader asks participants to say their name and the place they would most like to visit in the world. Other participants can then ask them what it is about that particular place that appeals.

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### WORKSHOP LEADER NOTE

#### Ice Breaker for Workshops - Ground Rules:

- Time it. Workshop icebreakers are meant to introduce the workshop itself. They shouldn't be too short or over run. The length should be proportionate to the time allocated to the orientation session itself.
- Be considerate. Having a light hearted workshop icebreaker is fine. Ensure that no one feels awkward though. That would not set the tone well.
- Keep dignity. Make sure nothing compromises the dignity of anyone, particularly if participants don't know one another.


#### Participant Expectations

Workshop leader asks each participant to state one expectation for the workshop. Responses are recorded on a flipchart and posted on the wall.

If one or more participants give the same response, the workshop leader places a checkmark beside the response.

**Housekeeping**

Workshop leader gives participants information regarding breaks, lunch, washroom facilities and reminds participants that no cell phones are permitted during the session.

NOTES 

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## Learning Objectives

At the end of this training, you should be able to:

- Summarize the *Accessibility for Ontarians with Disabilities Act* (AODA).
- Appreciate the many types of disabilities and the challenges they pose.
- Understand your role and your company's role in providing accessible customer service.
- Interact effectively with persons with disabilities.

## Introduction to AODA

In 2005, the Ontario Government took a step towards building a more accessible province when it passed the *Accessibility for Ontarians with Disabilities Act*, (AODA). It called for the development of mandatory province-wide standards for accessibility in five key areas of daily living: Customer Service, Information and Communications, Employment, Transportation, and Built Environment. Changes to the Customer Service Standard came into effect July 1, 2016. The Customer Service Standard is now part of the *Integrated Accessibility Standards Regulation (IASR)*. The Act legally requires all organizations, both public and private, that provide goods or services either directly to the public or to other organizations in Ontario (third parties) and that have one or more employees (“workers”) to provide accessible customer service to persons of all ability levels.

Timing:  
10 Minutes



The Act lays out the goal of an accessible Ontario by 2025. To reach this goal, the Standards Development Committees were asked to set out a series of proposed targets for what needs to happen and when, in increments of five years or less. The Act provides for standards to be developed so that organizations, both public and private, can spread out their accessibility investments over time, and they can plan ahead and incorporate capital expenditures into their normal business plans and strategies.

## Summary of Requirements of the Accessible Customer Service Standard

All providers that are covered by the Accessible Customer Service Standard (also known as the Customer Service Standard) must comply with the requirements summarized below. Providers with 50 or more workers and all designated public sector organizations have three additional requirements to meet. These additional requirements are listed separately.

Timing:  
15 Minutes



Please note that this list is a plain language summary of the requirements. In several cases, it does not include the full details of the requirement.

### What Requirements Apply to All Providers?

The following requirements of the Customer Service Standard apply to all providers that are covered by the standard. If you are a provider, you must:

1. Establish policies, practices and procedures on providing goods or services to people with disabilities.
2. Set a policy allowing people to use their own personal assistive devices to access your goods and use your services, and outline any other measures your organization offers (