

on the employment of people with disabilities in the bank

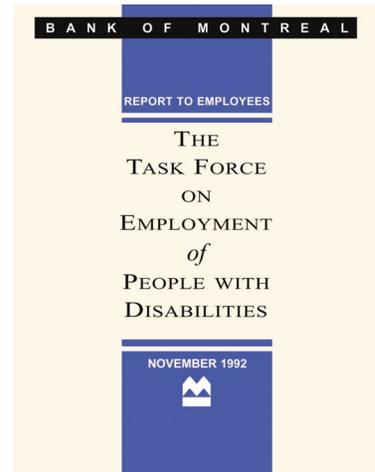


REPORT TO EMPLOYEES
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To access the 1992 *Task Force on Employment of People with Disabilities*, please [click here](#)



historical note

The language used in the original Task Force reports has changed over the last decade to reflect BMO's evolution in creating a diverse workforce and an equitable, supportive workplace. This inclusive workplace is one where individual differences are valued and respected, while accommodating individual needs. For example, the Office of Workplace Equality is now known as the Office of Diversity & Workplace Equity.

TASK FORCE REISSUE - ADVANCEMENT OF PEOPLE WITH DISABILITIES

president & ceo's message

Breaking Down Barriers for People with Disabilities

The Task Force on Employment of People with Disabilities was a critical step in the major self-assessment we undertook at BMO in the early 1990s, when we publicly committed to create an equitable, barrier-free (in the broadest sense) workplace and a workforce reflecting the communities we serve.

As with the other three Task Force reports, this one featured a spectrum of action plans — all generated by employees, all heartily endorsed by the leadership and all fully attached to no-nonsense deadlines. Released in November 1992, the report is being reissued in November 2004, timed to focus attention on a full-fledged diversity and workplace equity renewal process called Above & Beyond.

Whether you were around when the original Task Force report was released, or are one of many thousands of colleagues who have joined BMO in the interim, I recommend what continues to be a good read plus an excellent source of historical perspective. What it won't do, of course, is tell you what happened next. Let me treat you to a handful of excellent examples.

This report prompted a chain of policies and initiatives aimed at accommodating people with disabilities into our workplaces, starting with the elimination of physical barriers. The Office of Diversity and Workplace Equity oversees these programs. In addition to physically altering a succession of BMO workplaces, this arrangement has produced a wave of innovative individual accommodations, including specialized scanning and reading software.

TASK FORCE REISSUE - ADVANCEMENT OF PEOPLE WITH DISABILITIES

To address barriers to hiring people with disabilities, we created a hiring guide for managers. This guide not only dispels popular misconceptions about people with disabilities and replaces them with facts, but also includes advice on appropriate behaviours when interviewing candidates with specific disabilities. In addition, we have created affinity groups for blind and visually impaired employees, employees with physical disabilities, and deaf, deafened and hard of hearing employees.

We also took up the cause beyond our workplace, reaching out and recruiting candidates in partnership with such organizations as the Canadian Council on the Blind, the Canadian National Institute for the Blind, and the Canadian Council on Rehabilitation and Work. We sponsor and participate in abilities fairs, where we also actively recruit; and along with similar active recruitment on university and college campuses, we are currently sponsoring a series of conferences for the National Education Association of Disabled Students.

Most importantly, the employment of people with disabilities became a business priority with the unqualified support of the leadership team, meaning that business plans now had to include goals for hiring, retaining and supporting colleagues with disabilities; and meeting these goals became a factor in annual performance reviews.

Thus we continued to go about making ourselves into what we are today: an enterprise with a proud reputation for welcoming and supporting colleagues with disabilities.

Tony Comper
President & Chief Executive Officer, BMO Financial Group

EXTRACTED FROM THE 1992 TASK FORCE REPORT ON PEOPLE WITH DISABILITIES

DEFINING PEOPLE WITH DISABILITIES

Defining a person with a disability is not always a straightforward task. While the person must have a persistent physical, mental, visual, psychiatric, hearing or learning impairment, there are other considerations.

The person also has to believe that the persistent impairment puts her or him at a disadvantage in employment – or that an employer (or potential employer) would see it that way.

Every employee or potential employee has the right to decide whether or not to disclose a disability. Therefore, when the Bank reports how many employees have a disability, it is the employees who have made the identification, not the Bank.

While self-identification does not necessarily result in a totally accurate Bank profile, it is more effective than other means because it relies on the judgment of the individual about whether she or he is experiencing a limitation in job activity. An employee with a learning disability, for example, is the best judge of whether she or he is having difficulty reading an instruction manual.

We want to ensure that as many employees as possible benefit from the policies and programs that result from the Task Force's research. We would also like to be able to seek our own employees' first-hand advice and opinions on future recommendations. In short, we are looking for the best information possible on our progress toward our goal of a truly equitable workplace for people with disabilities.

overview & methodology

The Task Force on the Employment of People with Disabilities was constructed to be as representative of the Bank's workforce as possible. It included people with disabilities and managers of people with disabilities, as well as representatives from all divisions, all job groups and all job levels.

The Task Force consisted of a 10-member Steering Committee, Task Force Leader, four Task Force members and a 15-member Advisory Council.

These members faced a special challenge. Since employees are protected by law from disclosing whether they have a disability, and since those who had self-identified in a Bank survey were guaranteed confidentiality, the Task Force had limited access to employees with disabilities.

As well, since the Bank had little experience in this area, the Task Force needed to search out successful existing models.

Therefore, while the Task Force held in-depth and confidential discussions with a number of employees with disabilities and managers of employees with disabilities, much of the research led the Task Force outside the Bank.

EXTRACTED FROM THE 1992 TASK FORCE REPORT ON PEOPLE WITH DISABILITIES OVERVIEW & METHODOLOGY

Members talked to the relevant government ministries and agencies – the Canadian Human Rights Commission, for example – at both the federal and provincial levels. They approached 14 advocacy groups and other organizations that represent people with disabilities. They spoke to 15 other employers involved in creating workplace equality for people with disabilities, and to eight other organizations involved with education and support service programs.

The Task Force used an outside consultant to assist with the research plan. The same outside consultant conducted confidential, in-depth interviews across the country with a number of Bank employees with disabilities. The consultant also conducted five focus groups in three locations – Montreal, Toronto and Calgary – with managers of people with disabilities, with other managers and with specialists in Human Resources.

The Advisory Council members met several times to assist the Task Force with its work plan. They considered the results of the external and internal research, validated the findings as they applied specifically to Bank of Montreal, sorted through all the ideas that had been gathered, and then developed the four key recommendations and 23 action plans that would be of greatest value to the Bank in advancing the employment of people with disabilities.

For people who use a wheelchair and for many other people with mobility limitations, the greatest traditional barrier to employment has been the lack of physical access to buildings and facilities.

For people with disabilities generally, perhaps the greatest barrier has been the lack of access to educational and other opportunities that would prepare them to compete for jobs successfully.

Most of the barriers to employment flow out of the misconceptions that still surround disabilities and the people who have them, and still prevent too many of us from looking beyond a person's disability and seeing her or his full potential.

These attitudes underlie the behaviour that has resulted in the exclusion of people with disabilities from the workplace. These attitudes are the reason why many of the barriers exist.

the perception

Incorrect assumptions and inaccurate information about the skills and potential of employees with disabilities prevent many people from seeing beyond those disabilities. An employee with a disability is often considered to be less capable than other employees.

the findings

- Employees sometimes feel too much empathy, and may project themselves into “what it must be like” thinking. That puts the focus on what the person can’t do, rather than how the person could do it in a different way. The same kind of thinking prevents managers from considering employees with disabilities for training programs, promotions or transfers to other jobs.
- There is a misconception that people with certain types of disabilities are ideally suited to certain types of jobs – and, by inference, unsuited to other kinds of jobs.
- There is also a misconception that people with disabilities will be absent from work a lot, will have to go on frequent sick leaves, and won’t be able to handle overtime. Research shows that this is not the case.
- Some people feel uncomfortable in the presence of people with disabilities. They don’t know how to interact with them, what to say and not say, and sometimes their overall discomfort is enough to sway a hiring or promotion decision. Some people say they don’t know how to manage people with disabilities – it is outside their training and outside their experience.
- Others take the position that, while increased numbers of employees with disabilities could lead to reduced productivity, the Bank should hire them anyway – as an act of charity. This “charity mentality,” which deeply offends most people with disabilities, often lingers long after the employee with the disability has mastered the job.
- Despite their work experience, employees with disabilities who want to return to work following long-term disability leave have to overcome the same misunderstanding-related barriers that block new applicants with disabilities. Those who persevere and return to work, can find their re-entry stressful. And so can their managers.

the perception

Bank hiring policies and procedures, many developed without specific consideration for the requirements of people with disabilities, can place people at a disadvantage.

the findings

- The Bank's recruitment materials as well as some of its traditional recruitment practices – internal job postings, for example, and a reliance on walk-in applicants – tend to eliminate candidates with disabilities before they can ask to be considered.
- Aside from the Bank's leadership role in the Deaf Futures "job readiness" program in Toronto, there has been limited involvement in other job preparation programs for people with disabilities.
- Many people with disabilities have been denied access to educational and work opportunities and are often ruled out before the first interview stage because they lack the formal qualifications to compete.
- The traditional job interview, which focuses heavily on past performances in jobs, at school and even at play, works against those people with disabilities who may have few or very different experiences to recall.
- Job descriptions are perceived to be too inflexible to allow accommodation of employees with disabilities.
- Managers' unanswered questions include the following, all of which may make them reluctant to hire people with disabilities: What if it doesn't work out? What if it turns out that there is a performance problem with an employee with a disability, just as there sometimes is with other employees? Is it possible to fire an employee with a disability without special repercussions?
- In recent years a recession-prompted reduction in turnover has also limited job opportunities for people with disabilities.

the perception

There is a widespread assumption that the cost of accommodating employees who have a disability is too high, probably even prohibitive.

the findings

- There is limited awareness that up to 80% of individual accommodations (such as special work tools) can be achieved for less than \$500. Many cost nothing.
- There is limited awareness that the Bank is proceeding to make branches and offices physically accessible to customers and employees with disabilities.
- Managers are both confused and concerned about how to accommodate and promote employees with disabilities. They don't feel they have specific policies to guide them. They don't know what kind of additional help they might need, or where to find that help or how to make the best use of it. They don't know what it is going to cost, or who is going to pay.

the perception

The Bank's methods of communicating with employees and preparing them for advancement do not take sufficient account of the needs of employees with disabilities.

the findings

- Since they are only available in standard print format, employee communications can be inaccessible to employees who have visual disabilities.
- Since they are not captioned, Bank videos can be inaccessible to employees who are deaf or hard of hearing.
- Many employees with disabilities are discouraged from seeking advancement, or simply improving their skills, because provisions are not always made to accommodate them in training and development programs.

the perception

There is no individual accountability for setting and meeting recruitment, retention and advancement goals for people with disabilities.

the findings

- There is little understanding that building a truly equitable workplace is a business goal in keeping with the Corporate Strategic Plan – and that people with disabilities are an integral part of an equitable workplace.
- The Bank's employment objectives for people with disabilities have not been integrated into the business plan process through which all the Bank's other business objectives are reached and measured, nor are they explicitly addressed in the performance planning and review process.
- There is no effective and efficient system at the divisional level to measure and monitor the Bank's progress in hiring, retaining and advancing people with disabilities.

1992 ACTION PLANS & 2004 RESULTS TO DATE

help form a broader understanding

GOAL

Improve understanding of the employment and career advancement barriers faced by people with disabilities.

IMMEDIATE OUTCOME

- Every employee received a copy of the *Task Force on Advancement of People with Disabilities*. The reports are also available online.
- All managers of people in BMO's retail banking group were required to attend a five-day residential training initiative on managing for inclusion and managing diversity.

MOST RECENTLY

- Presentations on the business case for diversity are continually initiated by and presented to BMO's lines of business.
- The Institute for Learning offers a Business by Inclusion Workshop that focuses on diversity and inclusion issues in the workplace. The workshop offers in-depth discussions which articulate the business case for inclusion and helps individuals learn to take personal responsibility and accountability for creating an equitable and supportive workplace.

help get the process moving

GOAL

Provide the workplace modifications, alternative work tools, special training and individual assistance that will enable people with disabilities – including those returning from long-term disability leave – to compete equitably and effectively in our workplace and contribute fully to the Bank's goals.

IMMEDIATE OUTCOME

- A workplace accommodation policy was established to ensure the provision of support to people with disabilities during their recruitment, selection, and ongoing employment.
- BMO has established a centralized funding model as part of the workplace accommodation policy to ensure the provision of support to people with disabilities during their recruitment, selection, and ongoing employment. The cost of providing and updating accommodation is budgeted at the banking group level and the Office of Diversity & Workplace Equity administers the fund. Accommodations include communications support, technical devices and equipment, workstation environment modifications, human support, and job redesign.
- BMO's Return to Work program is designed to help employees who have not yet fully recovered from an illness or injury to ease back into work through provision of seamless accommodation support. BMO strives to find employees another, similar position if their original position is no longer available.

1992 ACTION PLANS & 2004 RESULTS TO DATE

make sure
everyone gets
the message

MOST RECENTLY

- In July 2000, BMO began working on an initiative to assist in improving technical accessibility for employees with disabilities. This initiative resulted in the formation of a new group called Adaptive Technology Services (ATS) whose mandate is to create a technically inclusive, barrier-free environment by establishing standards, processes and implementing systemic technical solutions.

GOAL

Enable all Bank employees to reach their full potential by providing easier access to Bank-related information as well as training and development opportunities.

IMMEDIATE OUTCOME

- BMO's accommodation policy covers the cost of individual accommodations such as JAWS, Zoom Text (software technology that aids individuals with visible disabilities), electronic note-takers and other scanning and reading software.
- Developed a training guide for all instructors and administrators of the Institute For Learning (IFL) programs to help them prepare in advance for classroom participation of employees with disabilities.

MOST RECENTLY

- The Adaptive Technology Services (ATS) group was established, whose mandate is to create a technologically inclusive, barrier-free environment by establishing standards, processes and implementing systemic technical solutions. This group works with LOBs, the Institute For Learning (IFL), managers, and committees to ensure all new platforms and training materials, and employee documents are accessible to all employees.
- New training videos are open-captioned.
- There is a TTY line in the HR Call Centre.
- BMO is actively engaged in a relationship with the Greater Vancouver Business Leadership Network (GVBLN). The GVBLN is an employer-led coalition of business, government and community organizations dedicated to marketing the benefits of hiring qualified individuals with disabilities, improving employment opportunities for people with disabilities and providing diversity awareness training.

GOAL

Increase the number of job applications from qualified people with disabilities.

IMMEDIATE OUTCOME

- BMO continually engages in specific outreach and recruitment activities to attract applicants with disabilities. We work in partnership with community agencies such as the Canadian Council of the Blind, the Canadian National Institute for the Blind (CNIB), the Canadian Hearing Society, and campus offices of students with disabilities.

get the
right people
interested

1992 ACTION PLANS & 2004 RESULTS TO DATE

- BMO has published articles which contain information for potential employees on what to consider when preparing for the workforce.
- Conferences for the National Education Association of Disabled Students (NEADS) have been coordinated with a focus on the transition from school to the workforce.

MOST RECENTLY

- BMO employees in Vancouver are involved with Face to Face in the Financial Sector, which is part of the National Access Awareness Week. In 2003, BMO employees were available to conduct informational interviews with disabled candidates looking for work.

GOAL

Publicize the Bank's commitment to the recruitment and advancement of people with disabilities and encourage their integration into Canada's social and economic mainstream.

IMMEDIATE OUTCOME

- BMO includes the positive portrayal of people with disabilities in the design of their pamphlets, magazine ads and posters.
- BMO works to build lasting and liveable communities. BMO's tools are donations and sponsorships at all levels from the national to the local.
- BMO developed leading-edge standards "Beyond the Code" which guide our nationwide efforts to accommodate customers and employees with physical disabilities in corporate and retail premises.
- BMO plays an active role within the Ability Edge program. The aim of the program is to provide valuable on-the-job work experience as well as skills and training to college and university graduates with disabilities.

GOAL

Provide a focus for ongoing leadership, advocacy, accountability and support for hiring, accommodating, retaining and advancing people with disabilities.

IMMEDIATE OUTCOME

- Through annual performance appraisals, executives are held accountable for meeting their diversity goals.
- BMO's Diversity Councils and Affinity Groups on both a national and divisional level are open to all BMO employees.
- BMO's commitment to diversity and workplace equity is supported by a comprehensive infrastructure, which includes goal setting, monitoring and evaluation. Through an extensive suite of online management information reports, the President and CEO and all BMO executives monitor progress towards these benchmarks on a quarterly basis.

reinforce our
commitment

change the
face of the
workplace

1992 ACTION PLANS & 2004 RESULTS TO DATE

help ensure
that the right
things happen

MOST RECENTLY

- BMO's Private Client Group designed a framework for a review process, which will require the executive Group Head to sign off all hires and promotions at senior management levels, attesting that a diverse slate of candidates has been considered.

GOAL

Establish individual accountability, at senior levels and throughout management, for hiring, accommodating, retaining and advancing people with disabilities, and measure our progress as we move toward a workplace that is truly equitable.

IMMEDIATE OUTCOME

- Beginning in 1993, all managers' business plans included goals for hiring, retaining and promoting women, visible minorities, Aboriginal people and people with disabilities. BMO has continued to set qualitative and quantitative goals and measure its progress towards a representative workforce.
- Through annual performance appraisals, executives are held accountable for meeting their diversity goals.
- BMO uses a confidential workforce survey to assess how well we are doing in our efforts to create a diverse workforce and an equitable, supportive workplace. It allows employees to confidentially identify if they are a member of one of the following groups: Aboriginal, visible minority, or people with disabilities.
- Included in BMO's Annual Employee Survey is a Diversity Index, a compilation of questions that enables BMO to measure how well employees think we are doing in the area of Diversity & Workplace Equity.

EXTERNAL RECOGNITION FOR BMO FINANCIAL GROUP

- 2004** MicroSkills Corporate Spirit Award: The Spirit Award was presented to BMO for demonstrating a commitment to recent immigrants, members of visible minorities and women through programs, projects and initiatives that support and develop innovative opportunities.
- Best 50 Corporate Citizens: BMO Financial Group placed first among financial institutions in the 2004 ranking of Canada's 50 Best Corporate Citizens.
- 2003** Ability Edge Achievement Award: BMO was recognized by the National Career Edge organization for our leadership in the financial industry as the strongest participant in the program and our leadership and strategy around the employment of people with disabilities. BMO is the first corporation who participates in the program to be honoured.
- National Multiple Sclerosis Society, Greater Illinois Chapter, Employer of the Year Award: In the Large Company category, the Society acknowledged Harris Bank for its commitment to making a positive impact on the professional lives of its employees. A Harris employee originally submitted the nomination for this award.
- Canadian Aids Society Certificate of Recognition: BMO Financial Group was chosen by the Canadian AIDS Society (CAS) Board of Directors to receive a Certificate of Recognition to acknowledge the significant contributions to the AIDS movement that BMO has made. BMO is the only financial institution to ever win this award.
- Top 100 Employers: BMO was named one of Canada's Top 100 Employers - the only bank to make the list for the second consecutive year. (Also named in 2002) Mediacorp Canada Inc.'s 2004 edition of *Canada's Top 100 Employers* includes companies from a range of industries that are leaders in attracting and retaining quality employees. BMO was also recognized as one of the Top Ten Employers in Canada for Visible Minorities and for Training & Development.
- CHRC Employment Equity Audit: BMO was the first Canadian bank found to be in compliance with all 12 statutory requirements with no undertakings ordered.
- 2002** EASNA Accreditation: BMO's EAP became accredited by the Employee Assistance Society of North America (EASNA) and was awarded "Exemplary Employee Assistance Programming" by that organization. BMO's EAP was the first program to have successfully met the requirements.
- Canadian Hearing Society Award: In recognition of BMO's commitment and efforts in promoting an accessible environment for deaf, deafened and hard of hearing employees.
- Daimler Chrysler Award: The Canadian Foundation for Physically Disabled Persons in recognition of demonstrated commitment to removing barriers for people with disabilities.
- 2000-2001** Vision Award: Human Resources Development Canada recognized BMO for achievements in employment equity. As of September 2003, BMO is the only company to receive this award twice. (BMO first won the award in 1995).
- 1998-1999** Career Edge Vision Award: Career Edge is a national, not-for-profit organization whose mandate is to enhance youth employability by providing internships through host organizations. BMO received this award for its continued Employment Equity achievements and increasing diversity in the workplace.
- 1996-1997** Whipper Watson Award: BMO was recognized by Easter Seals/March of Dimes.
- Louise Martin Award: The Paraplegic Association of Quebec recognized BMO for contributing significantly to the integration of people with disabilities in the workplace.
- 1993** Two Gold Mercury Awards for "Best in Class" in Employee Awareness and Employee Relations Campaigns: BMO was recognized by the International Academy of Communications Arts and Sciences - a U.S.-based organization that recognizes outstanding achievement in professional communications. BMO received the award for "Flexing Your Options", a guide to flexible work arrangements.

our commitment

We are committed to acting with integrity and respect about our customers, shareholders, communities and each other.

We draw our strength from the diversity and talent of our people and our businesses.

We insist upon high standards of conduct and encourage all to have a voice.

We are committed to ethical behavior and accountability for our every action.

We share our knowledge and resources to create consistently superior customer experiences.