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# Accommodation Policy (Canada)

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# 1. Accommodation Policy (Canada)

Macquarie is committed to providing a work environment that is inclusive and that is free from barriers based on race, ancestry, colour, religion/creed, sex (including pregnancy, childbirth or related medical conditions), national/ethnic origin, citizenship, age, disability, marital status, family status, sexual orientation, gender identity or expression, record of offences or any other characteristic or ground protected by law in the jurisdiction that the employee works (“Protected Ground”). Consistent with that commitment, Macquarie provides reasonable accommodation to staff for needs related to Protected Grounds, unless to do so would involve undue hardship.

Macquarie aims to provide reasonable accommodation, either during employment or return to work from a Protected Ground leave, in accordance with the principles of dignity, individualization and inclusion. Macquarie works cooperatively and respectfully with all partners in the accommodation process.

## 1.1 Purpose

The purpose of this Accommodation Policy is to ensure that all staff are aware of Macquarie’s commitment to providing appropriate accommodation when required to ensure that the work environment is inclusive and barrier-free.

## 1.2 Application

This Accommodation Policy applies to all Macquarie staff (including full-time and part-time employees, as well as casual and temporary employees, of the Macquarie Group regardless of seniority (‘Employees’), and any person engaged to work at Macquarie as a ‘non-employee’ staff member, including an independent contractor/consultant, volunteer, student or intern). It also applies to candidates for employment or engagement with Macquarie.

The policy applies to all stages and aspects of the employment relationship, including during: (i) recruitment, selection and assessment process; (ii) performance management, career development, advancement and re-deployment processes; and (iii) accommodation and return to work processes.

This Accommodation Policy does not address Flexible Workplace policies and practices that are available to Employees outside of a formal accommodation process. Please consult Macquarie's Flexible Workplace Policy, available on Macnet for further details.

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### 1.3 Requests for Accommodation

Macquarie strongly encourages the early identification of all requests for accommodation. Employees who have a need for an accommodation, or have questions about the process, can contact any of the following:

- Their immediate supervisor or manager;
- A Human Resources Business Partner;
- A member of the Employee Relations Team; or
- The Head of Human Resources for the Americas

Where possible, accommodation requests should be made in writing and should include:

- The Protected Ground on which the accommodation is being requested;
- The reason the accommodation is required with enough information to confirm the existence of a need for accommodation, and
- The nature of the Employee's needs or restrictions

### 1.4 Responding to a Request for Accommodation

Macquarie takes all requests for accommodation seriously. No Employee will be penalized for making an accommodation request.

Macquarie will, to the extent possible, deal with all requests promptly and on an individualized basis. Where necessary, interim accommodation may be provided while an accommodation request is being assessed or while longer-term solutions are developed. Generally, Macquarie addresses accommodation requests by (1) gathering further relevant information, (2) assessing available options and (3) implementing, monitoring and reviewing the accommodation, where applicable.

1. Gathering further relevant information: Upon receipt of an accommodation request, Macquarie may require more detailed information about the request and/or the Employee's needs and restrictions. This may include the need for written support or confirmation from third parties (e.g. a doctor's note or note from the Employee's church, religious leader, daycare provider, etc.). In some circumstances, Macquarie may also require expert assistance or advice (e.g. a functional capacity or ergonomic assessment or independent medical examination). Where specifically requested by Macquarie, reasonable costs (if any) associated with obtaining expert advice may be borne by Macquarie.

2. Assessing available options: Macquarie will consider or evaluate available options to provide the Employee with a requested accommodation. The Employee may be asked to provide, consider or discuss alternative solutions. The Employee will be consulted in the evaluation process with a view to finding reasonable accommodation.

3. Implementing, monitoring and reviewing the accommodation: As accommodations are by their nature, individualized assessments of an employee's needs, the process for implementing, monitoring and reviewing accommodations will differ from case to case.

In the case of a request for accommodation by an Employee in Ontario on the Protected Ground of disability wither during employment or upon return to work from a disability-related leave, Macquarie will follow the processes outlined in its Individual Accommodation Plan Process and Return to Work Process policy in accordance with Macquarie's obligations under the *Integrated Accessibility Standards, Ontario Regulation 191/11*, as established under the *Accessibility for Ontarians with Disabilities Act, 2005*. Please consult the Individual Accommodation Plan Process and Return to Work Process policy available on Macnet for further details.

## 1.5 Roles and Responsibilities in the Accommodation Process

The accommodation process is a shared responsibility. Both Macquarie and the Employee have responsibilities in that process.

*The Employee's Responsibilities* - Macquarie recognizes that the needs of the Employee requesting an accommodation (either during employment or upon returning to work from a Protected Ground leave) are central to the accommodation process. To ensure that their needs are being met in a timely fashion, the Employee is responsible for:

- Informing Macquarie of the need for an accommodation either during employment or upon return from any Protected Ground leave;
- Providing sufficient detail about the Employee's needs and/or restrictions, including information from 3<sup>rd</sup> parties or experts/professionals as requested or required;
- Obtaining and following any medical advice or treatment;
- Maintaining regular contact with and providing progress updates to Macquarie during any Protected Ground leave;
- Collaborating with Macquarie to find appropriate accommodation and/or return to work options; and
- Working with Macquarie to review, monitor and evaluate the accommodation (and/or return to work arrangements, as applicable) from time to time.

*Macquarie's Responsibilities* – During the accommodation process, Macquarie endeavours to:

- Accept an Employee's request for accommodation (either during employment or upon return from any Protected Ground leave) in good faith;
- Maintain regular contact with the Employee while on leave and providing timely return to work information;
- Collaborate with the Employee to find appropriate accommodation or return to work options, unless to do so would cause undue hardship;
- Maintain the Employee's privacy and confidentiality to the extent possible;
- Seek expert assistance or opinion where necessary to investigate alternative solutions; and

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- As identified and to the extent possible, analyze work practices and demands to ensure they are safe for the Employee.

## **1.6 Appropriate Accommodations**

Accommodations at Macquarie are, to the extent possible, developed on an individualized basis. Appropriate accommodations may include but are not necessarily limited to:

- Work station adjustments;
- Job re-design or temporary or permanent alternate work;
- Technical aids or assistive devices;
- Human support;
- Providing materials or access to materials in alternative formats;
- Changes to performance standards or demands;
- Providing leaves of absence;
- Changes to scheduling or hours of work; and
- Workplace physical or environmental modifications.

## **1.7 Confidentiality**

Confidentiality will be maintained throughout the accommodation process to the extent consistent with the actions taken by Macquarie to respond to the request.

Macquarie will retain, in a secure location, all information and documentation provided to it as part of the accommodation process. Such information will be shared with others on a need to know basis only or upon the written request and consent of the Employee requesting the accommodation.