



**DRIVEN  
BY PURPOSE,  
DEFINED  
BY IMPACT.**



# About Us

Partners for Planning is a national non-profit and charitable organization that supports people with developmental disabilities and their families to be proactive in planning for the future. P4P was founded in 2009 by families and for families, to help answer the question, “Who will love and protect our family members when we no longer can?”

## Our Mission

Partners for Planning empowers people with a disability and their families with resources to create meaningful lives and secure futures, firmly rooted in community.

## Our Vision

Partners for Planning envisions a future in which a person with a disability:

- Enjoys a meaningful and financially secure life
- Lives in a place of warmth and safety—a true home
- Actively participates in a caring and inclusive community
- Knows the loving support of family and friends
- Is respected and empowered to make choices
- Is protected from abuse and exploitation
- Contributes his or her gifts to their community
- Has a well-planned future enabling their family to have peace of mind

## Our Strategy

Partners for Planning aims to create tools and provide supports that move families from ideas to action. Our core priorities focus on advancing planning expertise, increasing opportunities to support families to overcome complex challenges and strengthening relationships that matter.

# Letter from the Executive Director

As a values-based organization, Partners for Planning has always been clear about its purpose—to empower people with intellectual disabilities and their families to build inclusive lives firmly rooted in relationships and community where people have real choice and control in their lives. That values-based purpose drives all of our activities and initiatives. It actively directs decision-making, guides strategy, and influences organizational culture.

Our purpose is not just aspirational; we believe it must translate into tangible results for our stakeholders and communities, primarily the people and families we serve. This year, guided by this belief, we have focused on delivering our work with a measurable impact that can be seen in the numbers, felt in people's lives, and sustained in the community of professionals who provide support.

This year, we committed to measuring and understanding the impact of our work. By integrating measurement and accountability into our daily operations, we ensure that we align purpose with outcomes - backed by evidence, not just intention.

I am happy to report that the results of our measurement process show that we are demonstrating measurable impact in empowering and supporting people and their families to have the confidence to move forward in planning for the future, and that thousands of people are making progress in their planning as a result of our work.

Never content to rest on our laurels, we continue to challenge ourselves to think differently, adopt new tools and technologies, and create innovative strategies to support future planning. We are learning from the data and evolving how we work - balancing bold thinking and our unwavering values - to drive forward purposefully.

No lasting impact is achieved in isolation. Over the past year, we have deepened our collaborations with partner organizations, people, families, and communities. We believe that impact multiplies when collective action takes hold. We are proud of the networks we've built and the trust that enables us to work side by side with others who share our purpose.

Partners for Planning recognizes that our work is far from finished. Our promise is to keep turning purpose into measurable impact for people and their families.

Jill Teeple  
Executive Director





# Our Year By the Numbers

41 webcasts

12,906  
viewers attended  
our webcasts

72,765  
unique visitors to the  
Planning Network

14,808  
subscribers to our emails

98%

of family  
members  
feel more  
knowledgeable  
after accessing  
our resources

96%

of professionals  
shared our resources  
with people with  
disabilities, their  
families, or other  
professionals in the  
last six months.

89%

of family members feel  
more confident to take  
an actionable step after  
accessing our resources

96%

of professionals who engaged  
with our resources felt more  
confident speaking to people  
with disabilities, their families,  
or other professionals about  
future planning







## “What People are Saying”

“In rural Ontario, it can be very isolated. Your information is helpful and reminds us that there are connections. Thank you!”

“We live in a different province (SK), but your resources and information (with adaptation) have helped us to plan for our son’s future. Thank you!”

“Your webinars are a great source of information and attending gives me additional knowledge and guidance navigating the system and preparing for my daughter’s future. We are very appreciative and BLESSED.”

“My husband and I felt very stuck not knowing where to start. The Planning Network helped us break down our goals into manageable steps and helped us find resources to help us begin to realize those goals.”

“Extremely valuable resource. Without Partners for Planning, I would’ve spent thousands of dollars talking to professionals with no idea of what I was talking about.”

“I feel so confident with the expertise provided and it makes me feel less alone and more helpful for my adult dependents.”

“Love the webcasts, and the lists of recommended professionals in geographic areas is helpful for lawyers and RDSPs.”



# Driving Forward

## **Strategic Priority: Advance Planning Expertise**

### ***A Growing Network of Planning Facilitators***

P4P's Planning and Facilitation Collaborative (PFC) is a national online community built to help people who care about building capacity in planning professionals to offer quality, value-based future planning and facilitation support to people with developmental disabilities and their families. Membership in the PFC continues to grow and has become 135 members strong, with a growing library of courses and resources, offering members the opportunity to network, share knowledge and experiences, and learn from one another through conversations, educational opportunities, and special events.

### ***Expertise in Action: Learning and Sharing Together***

Recognizing the power of relationships to create lasting impact, we continued our commitment to share our expertise broadly, and travel across the province to attend key events to connect with communities, partners and peers.

Members of the P4P team actively engaged in delivering presentations across Ontario and the country. Notably, we attended the Inclusion BC conference, appeared on a podcast by the John McGivney Children's Centre in Windsor, Breaking Down Barriers to Knowledge Exchange in Ottawa, Holland Bloorview Community Connects, Sawubona Africentric Circle of Support, Pathways Health Centre for Children, and more. A highlight of these efforts included delivering a workshop focused on Creative Solutions for Housing in Kenora for the newly formed Families for the Future, hosting a breakfast in Winnipeg for Inclusion Winnipeg and In the Company of Friends.



## **Strategic Priority: Share Creative Solutions to Complex Challenges**

### ***Conversations that Inform, Empower, and Inspire***

As part of our partnership on the REAL Xchange platform, P4P hosted two new webcasts in the DS Professional Learning and Development series. Both conversations explored difficult topics, including supporting families & caregivers experiencing child & youth aggression, as well navigating loss and grief, aiming to help professionals in the sector enhance their skills, build capacity, and share knowledge across the province.

In addition, P4P added popular new webcasts to the Planning Network, including a timely conversation in the fall about Jordan's Principle with the First Nations Child & Family Caring Society, Alternatives to Guardianship with PooranLaw and Microboards Ontario, Creative Options for Home with Kelly Casey, and Talking about Children's Mental Health with Children's Mental Health Ontario. These webcasts were viewed by more than 2300 people.

### ***New Insights, Same Trusted Resource***

This year, P4P made significant progress on updating the Ontario version of the Safe and Secure book, incorporating valuable feedback from family and self-advocate reviewers of the new version to ensure it reflects lived experiences and practical guidance. The new edition is designed to better support families in Ontario to help their family member with disabilities create a meaningful life, offering clearer and more current resources while highlighting voices from the community through powerful and heartfelt stories and poems. With growing buzz around the province, P4P is excited to launch the new edition in the coming year.





## **Strategic Priority: Strengthen Relationships That Matter**

### ***Connecting Across Communities***

Our ongoing efforts to expand our reach to diverse communities led our team to take three trips to Northwestern Ontario - Thunder Bay and Kenora - to meet with and learn from families. We became more informed about the demographics and geography of the region. We gained a deeper understanding of the challenges faced by those living in this area of Ontario, particularly the limited access to social and support services. Families shared their need for resources around financial planning, housing, estate planning and more, highlighting the urgency of addressing these gaps. These conversations affirmed that the work of P4P is both valuable and necessary, and they guide us in shaping the future efforts to better support these communities.

### ***Gaining Insights from Across the Country***

P4P's work is dependent on leveraging the knowledge and expertise of people around the country working to build meaningful lives in community for people with intellectual disabilities. We are watching with great interest the progress on the Human Rights Remedy in Nova Scotia. This year, we met with representatives from Inclusion Nova Scotia to help us understand what's happening in Nova Scotia as the government there undergoes massive transformation in the way people with developmental disabilities and their families are supported as they move from systems of segregation and congregation to authentic, inclusive, opportunities for people. Understanding what families are experiencing in Nova Scotia is shaping our thoughts about what families need in times of systemic transition.

# When Purpose Meets Impact



Over the past year, Partners for Planning has made significant strides in supporting people and families in planning for the future. From developing new webcasts and resources to enhancing our operations and strengthening governance, we have aimed to set the bar high in expanding our impact. Some highlights of growth over the past year include:

## **Shifting our Thinking from Outputs to Outcomes**

LIFT Impact Partners selected P4P to join their Empowering Abilities, Fuelling Growth cohort with six other social purpose organizations from around the country to build capacity in three key areas: Measuring Impact, Revenue Diversification, and Communicating Impact. Working with LIFT and learning from other organizations improved our ability to better measure and communicate the impact we have with our work.



## **Expanding Our Reach: Lunch & Learns Welcome More Attendees**

The Planning Network offers a wealth of information, toolkits, resources, and action guides for families. This is why we created our Lunch & Learns to help organizations connect the people and families they support to the right resources. Realizing that families can also benefit from a tour of the Planning Network, we expanded our Lunch & Learn webcast, and immediately saw a significant increase in attendance, indicating a need for this guidance across families and organizations.

## **Strengthening Leadership: Growth in Governance Expertise**

To ensure P4P continues to grow with strong leadership, we invited LIFT Impact Partners to work with our board. Through their guidance, we learned best practices and strategies to enhance governance, strengthen engagement and accountability, and improve decision-making, positioning us for even greater impact in the years ahead.

## **Working Smarter: Improvements in Technology and Automation**

This year, we introduced automation into our workflow, leveraged technology for efficiency, and implemented a new CRM system, streamlining key processes and building the capacity of our team. Working smarter allows us to focus more on supporting families and advancing our mission.





# Financial Snapshot

## SUMMARIZED STATEMENT OF OPERATIONS

REVENUE	2025	2024
Government Grants	808,965	669,288
Studio fees	21,620	52,740
Fees for service	14,527	22,593
Donations	12,996	-
Other revenue	60,253	19,457
TOTAL REVENUE	\$ 918,361	\$ 764,078
EXPENSES		
Salaries & Contracts	544,817	463,363
Program Expenses	151,776	150,103
Program Support	182,159	106,486
Amortization	10,942	12,042
TOTAL EXPENSES	\$ 889,694	\$ 731,991
SURPLUS/(DEFICIT)	\$ 28,667	\$ 32,087

## SUMMARIZED STATEMENT OF FINANCIAL POSITION

ASSETS	2025	2024
Current Assets	624,898	604,067
Capital Assets	19,783	26,114
	\$ 644,681	\$ 630,181
LIABILITIES AND NET ASSETS		
Current Liabilities	214,985	229,152
Net Assets	429,696	401,029
	\$ 644,681	\$ 630,181

# Acknowledging Our Volunteers

## Board

David MacMillan, Chair  
Nicole Dauz, Vice Chair  
Earl McIvor, Director  
Talika Walsh, Director

Chris Alano, Director  
Sherron Grant, Director  
Thirugnanam Thevarajan, Treasurer

## Family Advisory Committee

Chris Alano  
Sherron Grant  
Katie MacDonald  
Joyce Rivington

Linda Chaim  
Gail Keys  
Sue Mitchell  
Jiju Varghese

Anne Freeland  
Kellie Kirkwood  
Humberto Pacheco

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Ontario  
Trillium  
Foundation



Fondation  
Trillium  
de l'Ontario



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