

Plan, Power, Purpose

Partners for Planning | Annual Report 2025 - 2026



partners
FOR PLANNING

About Us

Partners for Planning (P4P) is a national non-profit and charitable organization founded in 2009 by families, for families. We were established to help answer a vital question: “Who will love and protect our family members when we no longer can?” Today, we support people with intellectual and developmental disabilities and their families to be proactive in planning for the future. By leveraging strategic partnerships, we build capacity within families, individuals, and professionals to move from ideas to action.

Our work empowers the community to navigate milestones. Focusing on supporting income security, reducing poverty, creating personal support networks, exploring innovative housing solutions, understanding legal planning considerations, and discovering meaningful possibilities for contribution and belonging within an inclusive community.

Our Mission

Partners for Planning supports people with disabilities and their families, and those who collaborate and work with them, by providing accessible knowledge, a robust resource hub, and fostering partnerships to create meaningful lives.

Our Vision

Partners for Planning envisions a Canada where people with disabilities and their families thrive in an inclusive community, supported by thoughtful planning to lead meaningful lives.

Our Strategy



Letter from Partners for Planning

At Partners for Planning, we recognize that thinking about the future can feel incredibly daunting. Between complex realities and daily demands, families often feel overwhelmed by the uncertainty of long-term planning. Our core commitment remains resolute: to walk alongside families as a trusted resource, helping break down barriers so that every person with disabilities can imagine and create a life filled with genuine belonging, purposeful days, and meaningful relationships in their community.

Over the past fiscal year, we successfully concluded our previous strategic plan and launched a new blueprint for our future - a process that allowed for rigorous reflection as we assessed our achievements and learnings from the past three years. This milestone is an opportunity to express profound gratitude to our team, Board, partners, and the record 20,000+ people, families, and professionals who placed their trust in us last year, as well as the tens of thousands more who accessed resources through the Planning Network.

Building on that foundation, we launched our 2025-2028 Strategic Plan, developed with insights from key stakeholders, focused on two fundamental questions: What does our community need from us next? And, who do we need to be to deliver it? The result is a dynamic plan built on three priorities: improving what we do, how we do it, and finding sustainable solutions for growth. This direction ensures we continue to evolve as purposefully as we are passionate.

As we ended the year, we launched a new project that returns us to our founding principles: directly supporting families in breaking down barriers and moving forward with planning for an inclusive life rooted in community. We also secured new funding that will allow us to expand our work to a new community of people, families and service providers.

The true measure of an organization isn't just where it stands today, but how effectively it prepares for tomorrow. We are proud to say that P4P leaves the year stronger and smarter than we entered it, committed, as always, to keep turning purpose into measurable impact for people and their families.



David MacMillan
Board Chair



Jill Teeple
Executive Director

Impact by the Numbers

96%

of professionals feel more confident speaking about future planning after accessing our resources

96%

of family members feel more knowledgeable after accessing our resources

“Powerful information, well done! As the grandmother of a [...] grandson with disabilities I have viewed your resources multiple times to stay informed and updated. And I am never disappointed, I usually take something new from them. Thank you!”

“The Planning Network is fantastic and shared so many great tips and info. I feel much more at ease as we start applying what was shared. I’m thankful our son’s teacher shared your resource page with us.”

91%

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

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

67%

of families take action after accessing our resources

93%

of professionals have shared P4P resources with people with disabilities, families, or their peers

“You do an amazing job informing families and people working in the sector, always relevant.”

81%

of families who accessed a resource in the last six months are actively working on planning for that particular subject

“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.”



2,500

views of Disability Tax
Credit-related resources
on the Planning Network

15,200+

Total Newsletter &
Email Subscribers
(3% Increase)

76,300+

Planning Network Unique
Visitors (5% Increase)

4,600

views of RDSP-related
resources on the
Planning Network

Our Reach & Growth

46
Webcasts

13,600+
Webcast Attendees
(5% Increase)

5,300+
Safe and Secure
books distributed

Highlights of the Year

Enhanced P4P Offerings

A National Conversation about Housing Solutions

In partnership with Diverse Family Roots Society in the Kootenays, B.C., the [Planning & Facilitation Collaborative](#) (PFC) hosted our first National Housing Forum, featuring diverse stories from across the country about innovative housing solutions to spark imagination and action towards creating local, individualized housing options. Opportunities like this support the ongoing success of Partners for Planning's Housing Workshops - helping people and families imagine and take action towards their individualized housing solution, fueled with ideas of possibility from across Canada.

Safe and Secure: New Content, Same Trusted Resource

Funded by a grant from The Law Foundation of Ontario, we launched the new [Safe and Secure \(Ontario Version\)](#) - a trusted guidebook that has given families peace of mind, confidence, and hope for almost 30 years. The fully revised update provides families across the province with free access to Ontario-specific solutions and fresh regional stories. This work ensures a new generation of families - over 5,300 reached so far - have the tools they need to secure a safe, meaningful, and deeply rooted life in the community for their family members.

We Listened to Our Community

At [Partners for Planning](#), we don't just collect data - we act on it. For example, insights from our recent Annual Impact Survey revealed that most families are planning across multiple dimensions simultaneously, contributing to their overwhelm. In response, we secured funding to expand our operational capacity, enabling us to roll out direct support to help people identify and move forward with their planning goals. By prioritizing this loop of listening, learning, and iteration, we can be responsive to families' changing needs.



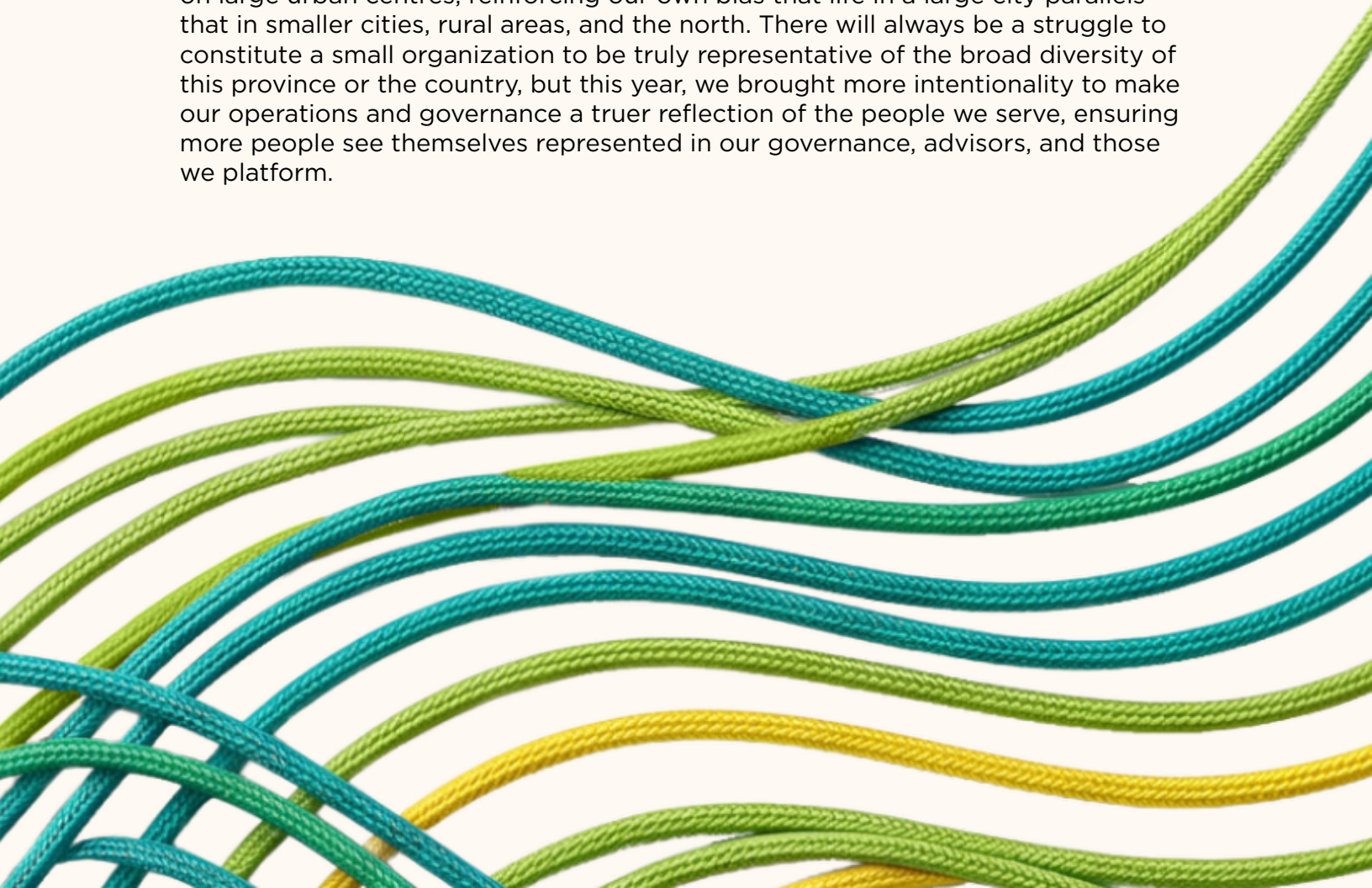
Operational Excellence

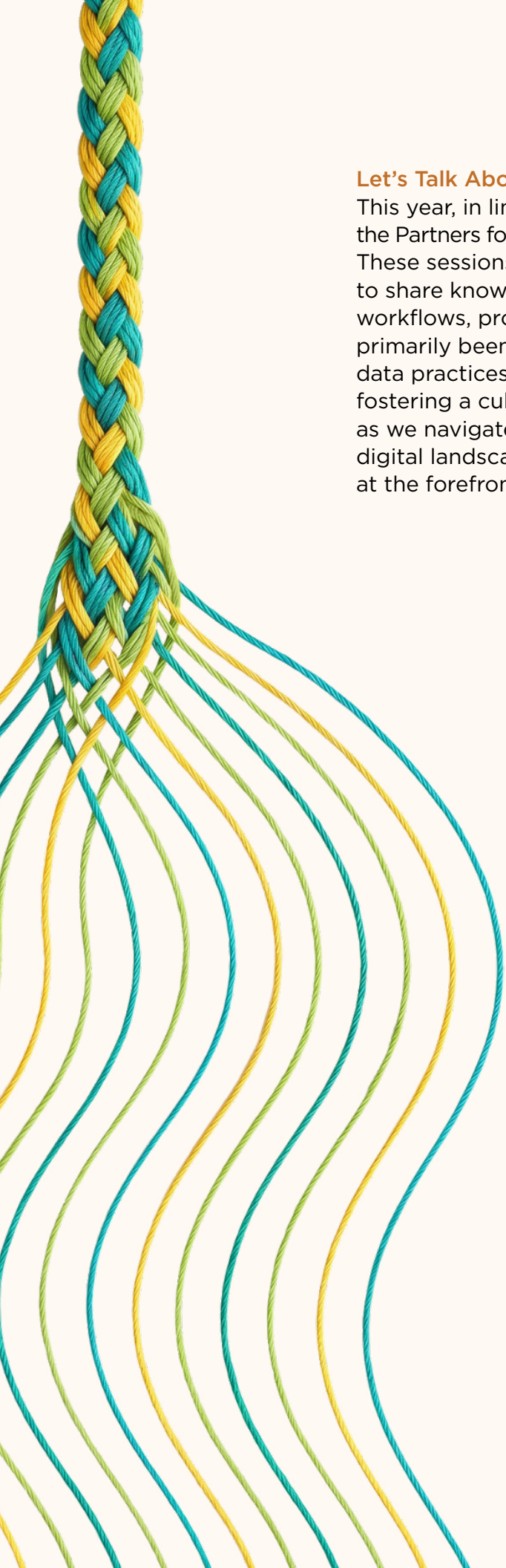
Moving More People to Take a Step Forward

After feedback on our Annual Impact Survey told us that families were confident to move forward after accessing our resources, but still had difficulty doing so, we took a hard look at how we were presenting information and deliberately revamped our resource pages to provide people with simple steps they could take to move forward, armed with the knowledge they needed to do so. We answered the question, “Where do I start?”, making it easier for more families to build momentum and take the next step. Our feedback shows that 15% more families took action this year.

Strengthening Decision Making

Partners for Planning began in Toronto and, for some time, centred its perspective on large urban centres, reinforcing our own bias that life in a large city parallels that in smaller cities, rural areas, and the north. There will always be a struggle to constitute a small organization to be truly representative of the broad diversity of this province or the country, but this year, we brought more intentionality to make our operations and governance a truer reflection of the people we serve, ensuring more people see themselves represented in our governance, advisors, and those we platform.





Let's Talk About Tech

This year, in line with our commitment to continuous learning, the Partners for Planning team launched monthly “Tech Talks.” These sessions provide a collaborative space for staff to share knowledge and innovative solutions to improve workflows, processes, and productivity. Our focus has primarily been on AI adoption, automation, and responsible data practices. These meetings have been instrumental in fostering a culture of curiosity and proactive problem-solving as we navigate emerging technologies and the evolving digital landscape, ensuring that Partners for Planning remains at the forefront of digital innovation in our sector.

Diversified Funding for Sustainability

Pursuing Mission-Driven Sustainability

Building on our partnership with LIFT Impact Partners in the Empowering Abilities, Fuelling Growth (EAFG) initiative, Partners for Planning began developing and implementing a comprehensive funding strategy to increase corporate, foundation, and individual donations aligned and informed by priorities to advance our mission and increase our impact for families. This year, Partners for Planning identified key funding needs and worked to better understand and engage prospective supporters to strengthen our fundraising efforts, secure new donors and enhance long-term partnerships and fundraising engagement in support of our mission.



Strengthening the Future of the Planning and Facilitation Collaborative

From the success of the 3-year project, the [Planning and Facilitation Collaborative](#) was awarded an additional year of funding from ESDC, enabling Partners for Planning, through the PFC's work, to continue making connections and building partnerships nationwide. One of the PFC's greatest strengths is its national, collaborative focus, which exposes members to connections and ideas beyond the limitations of their geographic community, fostering innovative thinking and a sense of hope. This additional funding has enabled the PFC to continue meeting our members' needs and to provide a fertile environment for collaboration and learning.

Launching Our Giving Tuesday Campaign

2025 marked [Partners for Planning's](#) first year participating in Giving Tuesday - an important step in expanding our year-end digital engagement efforts, leveraging our charitable status, and strengthening our connection with supporters through this global day of giving. The campaign focused on raising awareness of our mission and highlighting key impact metrics to our audience. We extend our deep appreciation to our supporters who made this campaign a success. As a first-time initiative, this campaign helped establish a foundation and baseline for future campaigns with opportunities to deepen supporter engagement through storytelling.



When Purpose Meets Impact

Making it Easier for Families to Come Together

The best support for families often happens when they come together with other families to learn and share experiences. With the launch of the fully updated [Safe and Secure \(Ontario version\)](#), we provided family networks and organizations around Ontario the opportunity and tools to do just that, with turnkey book launch events and a facilitation guide for hosting a book club. We supported more than 25 events over the last year, where families left feeling more confident to move forward as part of a stronger community. We are grateful to all the groups and group leaders who held events.

Knowing Better to Doing Better: A National Research Study

This year, [PFC](#) launched a research study, Expanding the Capacity of Planning & Facilitation Supports in Canada, with Principal Researcher and Anthropologist, Dr. Pamela Block of Western University. This research has gathered the lived experiences of people with developmental disabilities and their families, alongside those engaged in planning and facilitation across Canada who have shared the benefits and barriers to accessing quality planning supports. These narratives have offered insights for improving access and outcomes, providing learning that informs the PFC's offerings; growing knowledge and skills, and building capacity to better meet the demands of people and families.



On the Road Again

Creating meaningful impact begins with meeting families where they are; consistently showing up at conferences, events, and high school transition fairs remained a priority this year. By providing sound advice, resources to get started, and an in-person connection, we can help ease some of the overwhelm of navigating the complexities of future planning. When the opportunities arose to share our expertise through speaking engagements, we said yes. We presented and attended events across Ontario, from Thunder Bay to Ottawa to Sarnia and many places in between. Connections last long after these events end, and by building a connection, we are breaking down barriers to the planning process and giving families a path forward.

A Roadmap for the Next Three Years

This year, P4P entered a new chapter with the launch of our [2025-2028 Strategic Plan](#), developed in consultation with LIFT Impact Partners and informed by our Board, team, and stakeholders from across Canada. This plan prioritizes our commitment to improving and expanding our initiatives, striving for operational excellence, and creating a sustainable future for the P4P.

To align with our operational plan and provide transparency, we adopted new Key Performance Indicators (KPIs). With an 87% completion rate achieved on our Year 1 Operational Plan, we are proudly turning this vision into meaningful results for the families we serve.



Financial Snapshot

(Drafted Audited Financial Statement as of March 31st, 2026)

SUMMARIZED STATEMENT OF OPERATIONS

REVENUE	2025-2026	2024-2025
Government Grants	795,626	808,965
Studio Fees	55,210	21,620
Fees for Service	39,084	14,527
Donations	11,745	12,996
Other Revenue	111,989	60,253
TOTAL REVENUE	\$ 1,013,654	\$ 918,361
EXPENSES		
Salaries & Contracts	653,212	544,817
Program Expenses	194,234	151,776
Program Support	152,512	182,159
Amortization	8,863	10,942
TOTAL EXPENSES	\$ 1,008,821	\$ 889,694
SURPLUS / (DEFICIT)	\$ 4,833	\$ 28,667

SUMMARIZED STATEMENT OF FINANCIAL POSITION

POSITION	2025-2026	2024-2025
Total Assets (Current & Capital)	624,038	644,681
Current Liabilities	189,509	214,985
Net Assets	434,529	429,696
TOTAL LIABILITIES & NET ASSETS	\$ 624,038	\$ 644,681

Acknowledging Our Supporters

Board

David Macmillan, Chair
Nicole Dauz, Vice Chair
Earl McIvor, Treasurer
Sherron Grant

Janice Hamilton
Julie LaSorda
Tod Madden
Denyse Newton

Rebecca Rankin
Judell Soulsby
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Sherron Grant
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Katie MacDonald
Sue Mitchell

Wendy Newbery
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Gunjan Seth

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Ministry of Children, Community and Social Services
Ministère des Services à l'enfance et des Services sociaux et communautaires



Employment and
Social Development Canada

Emploi et
Développement social Canada



We would also like to express our gratitude to all our partner organizations across Canada for your contributions to Partners For Planning's growth.

Our heartfelt thanks to our wonderful donors whose generosity helps strengthen our capacity to serve people and families.

The P4P Planning Network offers **FREE resources** designed to empower people with a disability and their families to create meaningful lives and secure futures, firmly rooted in community.

[smart strategies](#) | [creative tools](#) | [sustainable solutions](#)

