



INCLUSION WEST NIAGARA STRATEGIC PLAN 2026-2030

Prepared By: Claudia Ferryman - Rainmaker Strategies Group

October 6, 2025

Table of Contents

EXECUTIVE SUMMARY3

 Background and Considerations3

 Strategic Plan Process Highlights3

MISSION, VISION, VALUES AND PILLARS4

PILLARS, STRATEGIES AND GOALS5

HIGH-LEVEL IMPLEMENTATION PLAN (2026–2030)10

 This section provides a high-level implementation plan for deploying the goals over the next four years.10

SAMPLE ACTION PLAN TEMPLATE14

 High-Level Roadmap/Phases/Activities for Fee-for-service initiative15

HIGH-LEVEL STRATEGIC PLAN ROADMAP (YEARLY SUMMARY 2026-2030)16

STRATEGIC PLAN 2026-2030 IMPLEMENTATION PLAYBOOK17



Executive Summary

In Spring 2025, Rainmaker Strategies Group was engaged by Community Living Grimsby Lincoln West Lincoln (CLGLWL), now Inclusion West Niagara (IWN) to develop and facilitate a process for creating a new four-year strategic plan to guide the organization into the future. This process included the following key activities:

- Environmental Scan – included a survey, interviews and focus groups to engage key internal and external partners and participants
- Board of Directors Retreat in June 2025
- Leadership Planning sessions



This report presents the results of the strategic planning process, including refreshed Mission, Vision, and Values as well as the new strategic pillars, strategies, and goals.

Background and Considerations

IWN supports adults and children through a variety of programs that include one or several of the following services: Adult Community Programming including employment services, Adult and Children’s Supported Group Living homes (SGL), Supported Independent Living (SIL), Family Support, Homeshare, special services at home (SSAH), and Children’s Respite.

At a sector level, the Developmental Services Sector is 2.5 years into a 10-year transformation plan – Journey to Belonging (J2B). J2B provides a vision for one of the most significant transformations the sector has experienced, which is focused on choice and flexibility, improving service experience, and improving quality and accountability. The transformation creates challenges and opportunities as the sector identifies and designs potentially fundamental changes in its operations. Reflection on this transformation initiative was considered throughout the strategic planning process.

We recognize that IWN aims to develop innovative solutions and effective responses to the numerous challenges confronting the sector and its constituents. In turn, Rainmaker Strategies Group realizes that creating unique approaches to serving requires a move away from the common lens of looking at people served as just needing daily care and instead aims to understand their experience from their authentic voice – providing choice and inclusion where people with developmental disabilities are supported to participate in their communities and live fulfilling lives.

Strategic Plan Process Highlights

- Environmental scan survey had 75 respondents with a mix of supported individuals, families, staff, funder(s) and community partner(s) providing input.
- Conducted 6 focus groups with an average of 8 attendees, to gain validated inputs from employees, families and people supported
- Conducted SWOT and PESTLE Analysis with the leadership team
- Board Retreat in June with the majority of directors in attendance, carried out over 2 evenings
- Facilitated a leadership planning meeting to review and gain inputs on the Mission, Vision and Values coming from the Board Retreat
- Unfacilitated leadership planning session to further define themes and goals.

Mission, Vision, Values and Pillars

The following Mission, Vision, Values, and Pillars were developed with input from the Board of Directors and Leadership team. To reflect IWN’s commitment to people-first planning, evolving service needs, and long-term sustainability.

Mission

We are committed to engaging and working with people who have developmental disabilities, empowering every stage of life through compassion, inclusion and unwavering partnership, to build the life they want.

Vision

A future without barriers. A world where everyone belongs.

Values

Choice ~ Integrity ~ Dignity

New – a Rebrand was underway while strategic planning work was conducted

Organizational Name: Inclusion West Niagara
Tagline: Supporting Dreams. Building Community. Celebrating Abilities.

Pillars and Themes

Pillar: Enriching Lives Through Connection and Choice	Theme: “Living Life with Purpose and Possibility”
Pillar: Purposeful Communication and Engagement	Theme: “Listening, Sharing, and Belonging”
Pillar: Innovation, Sustainability, and Smart Practices	Theme: “Innovating Wisely for a Strong Tomorrow”
Pillar: Shaping Our Identity and Future Impact	Theme: “Clear Vision. Shared Goals”
Pillar: A Future-Ready Workforce	Theme: “Growing Talent to Meet Tomorrow’s Needs”

Strategies and Goals

<p>Pillar: Enriching Lives Through Connection and Choice</p> <p>Theme: “Living Life with Purpose and Possibility”</p> <p>Strategies:</p> <ol style="list-style-type: none"> 1. Person-Directed and Responsive Programming 2. Staff and Family Capacity-Building 3. Celebrating Belonging and Community Inclusion 	<p>Strategic Theme Areas & Goals:</p> <ol style="list-style-type: none"> 1. Person-Directed and Responsive Programming <ul style="list-style-type: none"> ○ Build individualized Community Participation Services and develop a fee-for-service structure ○ Expand community connections in programming options: passport, respite ○ Address diverse needs and explore offering more choice in Supported Group Living options ○ Ensure principles of equity, diversity, inclusion and accessibility are evident in all actions 2. Staff and Family Capacity-Building <ul style="list-style-type: none"> ○ Provide staff and family training on supporting valued roles, building social capital, inclusive community participation, and person-centred supports. ○ Increase inclusion of people to make choices with the goal of “nothing about us without us” 3. Celebrating Belonging and Community Inclusion <ul style="list-style-type: none"> ○ Build on partnerships and community engagement ○ Demonstrate inclusion and belonging in all showcased events
---	---

<p>Pillar: Purposeful Communication and Engagement</p> <p>Theme: “Listening, Sharing, and Belonging”</p> <p>Strategies:</p> <ol style="list-style-type: none"> 1. Intentional and Inclusive Communication 2. Collaborative Engagement with Families and Youth 3. Community and Government Relationship Building 4. Expand Equity, Diversity and Inclusivity work to include Accessibility (EDIA), and to be embedded in all aspects of the work we do. 	<p>Strategic Theme Areas & Goals:</p> <ol style="list-style-type: none"> 1. Intentional and Inclusive Communication <ul style="list-style-type: none"> ○ Strengthen internal and external communication practices ○ Improve the use of social media for meaningful updates ○ Launch a communication survey to identify current gaps ○ Engage people supported and staff in shaping inclusion efforts through participatory forums and feedback. 2. Collaborative Engagement with Families and Youth <ul style="list-style-type: none"> ○ Develop and deliver family education and engagement sessions ○ Establish a youth council to include young voices in decision-making 3. Community and Government Relationship Building <ul style="list-style-type: none"> ○ Strengthen relationships with government and local community partners ○ Advance advocacy through purposeful engagement strategies 4. Expand Equity, Diversity and Inclusivity work to include Accessibility; to be embedded in all aspects of the work we do. <ul style="list-style-type: none"> ○ Expand the mandate of the committee and communicate ○ Enhance training for leaders and front-line leaders to ensure understanding of the expectations and accountability of all aspects of this work.
---	---

Pillar: Innovation, Sustainability, and Smart Practices

Theme: “Innovating Wisely for a Strong Tomorrow”

Strategies:

1. **Smart Systems, Sites and Services**
2. **Data and Financial Oversight**
3. **Risk Management and Operational Excellence**

Strategic Theme Areas & Goals:

1. **Smart Systems, Sites and Services**
 - Invest in flexible, user-friendly technologies
 - Strengthen cybersecurity and system support
 - Explore the use of technology to enhance opportunities for people we support
2. **Data and Financial Oversight**
 - Promote data-driven decision-making
 - Build robust funding, grant, and Fee For Service models
 - Engage managers in practical, aligned budgeting
3. **Risk Management and Operational Excellence**
 - Align compliance with modern standards
 - Enhance accountability measures & reporting
 - Maintain modern standards in property maintenance and transportation
 - Ensure principles of equity, diversity, inclusion and accessibility are evident in all actions
 - **Develop and launch a 10-year housing strategy that reflects the changing needs, preferences, accessibility and rights of the people we support.**

Pillar: Shaping Our Identity and Future Impact

Theme: Clear Vision. Shared Goals.

Strategies:

1. **Brand and Identity Building**
2. **Accessible Housing and Community Impact through partnerships and collaboration**
3. **Equity, Inclusion, Accessibility and Social Accountability**

Strategic Theme Areas & Goals:

1. **Brand and Identity Building**
 - Market the organization’s new name and vision
 - Align branding with values of typical, inclusive lives
2. **Accessible Housing and Community Impact**
 - Host a housing coalition, create and launch a 10-year housing conversion plan
 - Build new housing relationships for future planning
3. **Equity, Inclusion, Accessibility and Social Accountability**
 - **Strengthen sustainability efforts** with practical environmental initiatives such as waste reduction, green procurement, and building efficiency – Reduce, Reuse, Recycle

<p>Pillar: A Future-Ready Workforce</p> <p>Theme: “Growing Talent to Meet Tomorrow’s Needs”</p> <p>Strategies:</p> <ol style="list-style-type: none"> 1. Workforce Development and Leadership Readiness 2. Standardized Practices and Inclusive Support 3. Comprehensive, Relevant Training 	<p>Strategic Theme Areas & Goals:</p> <ol style="list-style-type: none"> 1. Workforce Development and Leadership Readiness <ul style="list-style-type: none"> ○ Implement workforce planning and succession strategies ○ Introduce mentorship, leadership training, and guides for transitions 2. Standardized Practices and Inclusive Support <ul style="list-style-type: none"> ○ Clarify staff accountability across roles (e.g., Managers, Team Leads) ○ Embed Equity, Diversity, Inclusion and Accessibility principles in staff support ○ Provide information in plain language ○ Implement a test of policy interpretation and comprehension 3. Comprehensive, Relevant Training <ul style="list-style-type: none"> ○ Expand training content to meet people where they are at; this may include mental health, dual diagnosis, Trauma-informed care, team building, individualized supports, aging in place ○ Develop volunteer programming to enhance service capacity
--	---

High-Level Implementation Plan (2026–2030)

This section provides a high-level implementation plan for deploying the goals over the next four years.

Pillar	Near-Term (Year 1, 2026-2027)	Medium-Term (Year 2, 2027–2028)	Longer-Term (Year 3 & 4, 2028–2030)
	<i>Foundation & Quick Wins</i> Focus: Launch pilots, gather input, build systems, and strengthen engagement.	<i>Expansion & Integration</i> Focus: Scale successful pilots, embed practices, deepen external engagement.	<i>Sustainability & Impact</i> Focus: Solidify identity, demonstrate impact, and sustain growth.
Pillar	Pillar: Enriching Lives Through Connection and Choice <ul style="list-style-type: none"> Design Community Participation Services pilot and draft fee-for-service model. Design and pilot expanded passport and respite program options. Launch staff and family training on person-centred supports. Host showcased community events emphasizing belonging. 	Pillar <ul style="list-style-type: none"> Implement full Community Participation Services with fee-for-service. Expand staff and family training to focus on building social capital. Celebrate community belonging through annual inclusion showcases. 	Pillar <ul style="list-style-type: none"> Fully embed individualized, person-directed services across programs. Celebrate community belonging through annual inclusion showcases.
Pillar	Pillar: Purposeful Communication and Engagement <ul style="list-style-type: none"> Conduct a communications survey and analyze results. Enhance social media presence and consistency. Launch first participatory forums for staff and people supported. 	Pillar <ul style="list-style-type: none"> Implement improved internal communication systems (intranet, newsletters). Deliver training for leaders/direct support staff on EDIA + Accessibility accountability. Strengthen advocacy presence and influence in 	Pillar <ul style="list-style-type: none"> Demonstrate sustained improvement in communications (measured by repeat survey). Embed advocacy presence and influence in government and community networks. Fully integrate EDIA +

	<ul style="list-style-type: none"> • Deliver initial family education sessions. • Establish expanded EDIA committee mandate to include enhanced training for leaders and direct support professionals and define policy/operational changes. • Strengthen government and community partner relationships with structured engagement plan. 	government and community networks.	Accessibility practices into policies, culture, and operations.
Pillar	Pillar: Innovation, Sustainability, and Smart Practices <ul style="list-style-type: none"> • Invest in baseline technology upgrades (flexible, user-friendly systems). • Begin cybersecurity strengthening project. • Align compliance and accountability measures with modern standards. • Build a network of data collection points for each Department. • Enhance budgeting training for managers. • Launch initial environmental sustainability projects (waste reduction, recycling). 	Pillar <ul style="list-style-type: none"> • Scale technology for program delivery and person-centred supports. • Introduce data-driven decision-making tools for managers. • Show evidence of data-driven planning across departments. • Develop modern standards in property, transport, and operational excellence. • Expand green procurement and building efficiency projects. 	Pillar <ul style="list-style-type: none"> • Demonstrate strong cybersecurity and digital resilience. • Maintain modern standards in property, transport, and operational excellence. • Review/report on annual environmental and social accountability achievements. • Position the organization as a model of sustainability and future-ready practices.
Pillar	Pillar: Shaping Our Identity and Future Impact <ul style="list-style-type: none"> • Roll out campaign to market new name and vision. 	Pillar <ul style="list-style-type: none"> • Strengthen brand recognition across community and government. 	Pillar <ul style="list-style-type: none"> • Become recognized leader in inclusive brand

	<ul style="list-style-type: none"> • Begin branding refresh aligned with values of inclusive lives. • Convene a housing coalition and start drafting the housing conversion plan. • Launch development of a 10-year housing strategy. (see full plan on page XX) • Begin exploring choice in Supported Group Living. 	<ul style="list-style-type: none"> • Finalize and launch 10-year housing conversion plan. • Build new housing relationships for future planning. • Advance the housing strategy into the implementation phase. • Expand Supported Group Living options to reflect diverse needs. • Increase involvement of people supported in decision-making (“nothing about us without us”). 	<p>identity and advocacy.</p> <ul style="list-style-type: none"> • Strengthen and sustain housing partnerships for long-term impact. • Deliver mid-point review of 10-year housing strategy progress. • Continuously expand and adapt choice in Supported Group Living.
Pillar	<p>Pillar: A Future-Ready Workforce</p> <ul style="list-style-type: none"> • Begin workforce planning and succession process. • Clarify staff accountability frameworks across roles. • Introduce plain language standards in policies and communications. • Launch training pilots in mental health, trauma-informed care, and inclusive supports. • Build and pilot mentorship program. • Develop and pilot tabletop policy comprehension program. • Evaluate and refresh capacity-building programs (such as 	Pillar <ul style="list-style-type: none"> • Launch mentorship and leadership training programs. • Expand training portfolio to include dual diagnosis, team building, and aging in place. • Pilot volunteer program to enhance service capacity. • Fully implement policy comprehension testing and standardized accountability practices. 	Pillar <ul style="list-style-type: none"> • Finalize workforce succession strategies across all levels. • Sustain a comprehensive training portfolio, keeping pace with sector trends. • Expand volunteer program to become a core part of service delivery.

	engaging volunteers and students)		
--	--------------------------------------	--	--

Sample Action Plan Template

This section provides guidance on creating a detailed action plan, along with a sample template. A comprehensive action plan should have the following items formatted in a table format for ease of use:

1. **Action Item** → The major initiative to achieve the goal.
2. **Steps / Tasks** → Break it down into smaller, trackable steps.
3. **Responsible Lead(s)** → Who is accountable for making it happen.
4. **Timeline** → Near-term, medium-term, or specific quarters/years.
5. **Resources Needed** → Funding, staff, training, technology, etc.
6. **Key Partners** → Families, community agencies, government, etc.
7. **Success Indicators / Measures** → How progress will be measured (KPIs, milestones, outputs).
8. **Status / Notes** → Space for tracking updates.

The following is a sample template you can use to start building the action plan:

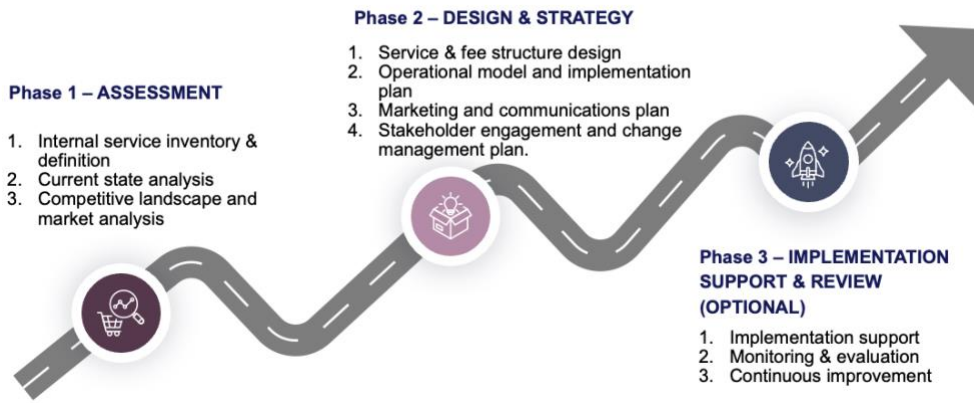
Action Plan Template

Strategic Pillar: _____

Strategic Goal: _____

Action Item	Steps / Tasks	Responsible Lead(s)	Timeline	Resources Needed	Key Partners	Success Indicators / Measures	Completed Status / Notes
Example: Expand community connections in programming options	1. Map existing partnerships 2. Identify gaps in offerings 3. Reach out to 3 new organizations	Director of Programs + Community Engagement Lead	Q1–Q2 2026	Staff time, outreach materials	Local agencies, families, participants	3 new partnerships signed	

High-Level Roadmap/Phases/Activities for Fee-for-service initiative



Phase/Activities
Phase1: Assessment
Internal Service Inventory
Current State Analysis
Market Analysis
Phase 2: Design & Strategy
Service and Fee Structure Design
Operational Model & Implementation Plan
Marketing & Communication Plan
Key Partner Engagement & Change Management Plan
Phase 3: Implementation Support & Review
Implementation Support
Monitoring & Evaluation

High-Level Strategic Plan Roadmap (Yearly Summary 2026-2030)

The following table provides a summary of key activities over the 4 years of the Strategic Plan.

Timeline with Key Focus Across All Pillars

Year	Activities
Near-Term (Year 1: 2026-2027)	<ul style="list-style-type: none"> - Launch pilots (community participation, respite, communication forums) - Roll out branding campaign and new name - Workforce planning and training pilots - Tech upgrades & cybersecurity baseline - Convene housing coalition & draft 10-year plan - Launch environmental initiatives (reduce, reuse, recycle)
Medium-Term (Year 2: 2027-2028)	<ul style="list-style-type: none"> - Scale individualized services and fee-for-service structure - Expand Supported Group Living choices - Establish youth council, strengthen govt/community relationships - Mentorship and leadership training - Data-driven decision-making tools for managers - Launch 10-year housing conversion plan - Expand green procurement and efficiency projects
Longer-Term (Years 3-4: 2028-2030)	<ul style="list-style-type: none"> - Fully embed person-directed services & annual inclusion showcases - Youth council continued development - Advocacy presence solidified - Mature workforce succession planning & volunteer program - Strong cybersecurity & modern compliance - Mid-point review of 10-year housing strategy - Recognized leader in inclusive branding & sustainability

Implementation Playbook

Introduction

IWN has completed the development of its **2026–2030 Strategic Plan**, shaped by meaningful input from employees, leadership, people supported and their families, board members, community partners, and funders. The next phase focuses on **implementation** — turning strategic goals into action that advances the mission and vision over the next four years. This playbook outlines key steps, timelines, and roles to guide the successful launch and integration of the strategic plan across all levels of the organization.

1. Immediate Next Steps (November 2025 – March 2026)

A. Communicate the Strategic Plan

- **Internal Launch:**
 - Complete and provide accessible summaries and visuals of the plan for different audiences (staff, people supported, families) to include house image posters of various sizes and the final version of the strategic plan.
 - Record launch video and distribute.
 - Host a staff and leadership meeting (town hall) to celebrate the completion of the plan and highlight key priorities.
 - Create and launch the new branding program to promote the new name and tagline.
- **External Partners Communication:**
 - Announce the plan publicly via website, newsletters, and social media. Possible sit-down meetings with key external partners.
 - Create and share a press release and a letter from the Executive Director outlining how the plan will guide the organization’s future. Add the press release to the website, social media, and send it out to various media outlets.
- **Board and Leadership Alignment:**
 - Provide briefing notes and a presentation deck so all leaders can speak consistently about the plan and its intent.
- **Communication and Engagement Timeline**

Milestone	Activity	Audience	Timeline
Board Retreat	Review mission, vision, values; confirm implementation roadmap	Board & Leadership	Early June 2025 <i>(completed)</i>
Plan Launch	Announce the new strategic plan (internal & external)	Staff, Board, Families, Key Partners	November–December 2025
Pillar Action Planning Workshops	Develop detailed plans and assign accountability – assign Pillar Leads	Managers & Sr. Leaders	March 2026

B. Establish Implementation Infrastructure

- **Pillar Leads:**
Appoint internal leads/department heads or working groups for each of the five strategic pillars to champion implementation.
- **Governance and Accountability:**
Define reporting expectations between the Board, leadership team, and operational staff.
- **Finalize the High-Level Implementation Roadmap:**
Confirm which initiatives will be tackled in the near term (Year 1), medium term (Year 2), and longer term (Years 3–4).

2. Early Implementation Phase (April – December 2026)

A. Action Planning

- Conduct **Action Planning Workshops** with Pillar Leads, managers, and key staff to:
 - Identify concrete action items under each strategic goal.
 - Assign responsibilities, timelines, and success measures using the Action Plan Template.
 - Ensure plans reflect equity, inclusion, and accessibility commitments.
- Integrate these plans into annual operational workplans and departmental priorities.

B. Engagement and Progress Update Strategies

- Develop a **Strategic Plan Communication Toolkit** including FAQs, slide decks, and sample messages to reinforce consistent messaging.
- Create visible communication channels (intranet updates, newsletters, staff town halls) to track and share progress.
- Launch a **Strategic Plan Dashboard** for quarterly updates to staff, families, and key partners.

C. Capacity and Resource Alignment

- Align budgets and staffing with strategic priorities.
- Identify funding opportunities, partnerships, and efficiency improvements that support plan delivery.
- Provide leadership and staff with professional development on championing change, and inclusive practices.

3. Mid-Term Implementation (2027)

A. Integration and Measurement

- Review and refine all operational plans to ensure alignment with the strategic pillars.
- Conduct quarterly and annual progress reviews led by each Pillar Lead.
- Collect data to demonstrate progress on goals and identify emerging needs.
- Highlight success stories to celebrate impact and reinforce engagement.

B. Strengthen Partnerships

- Deepen relationships with key partners, including funders, community organizations, and advocacy networks.
- Continue co-design efforts with people supported and families to ensure lived experience remains central to all engagement.
- Increase collaboration with youth, volunteers, and family councils.

4. Longer-Term Implementation (2028–2030)

A. Sustaining Impact and Continuous Improvement

- Conduct a **comprehensive mid-plan review** in 2028 to assess progress, challenges, and any necessary course corrections.
- Update the implementation roadmap to reflect emerging opportunities and lessons learned.
- Continue to align resources and operations with long-term strategic goals.
- Share a **Progress Report to the Community** showcasing achievements and future directions.

B. Preparing for the Next Strategic Cycle

- Begin collecting input from staff, people supported, families, and partners to inform the next strategic planning process in 2030.
- Reflect on organizational learning and systems improvements developed through this plan.
- Reaffirm commitment to ongoing innovation, EDI, and sustainability.

5. Governance and Accountability Framework

Group	Primary Role	Key Responsibilities
Board of Directors	Oversight & alignment	Approve strategic and operational updates; review annual progress reports; ensure mission and values alignment.
Executive Director & Senior Team	Leadership & coordination	Translate the plan into operational actions; monitor implementation; communicate results.
Pillar Leads	Execution & engagement	Lead pillar-specific actions; engage staff and key partners; track outcomes and metrics.
Staff and Key Partners	Participation & feedback	Contribute ideas, support implementation, and provide input on what's working and what can be improved.

6. Sustaining the Momentum and Reporting

The success of this plan relies on consistent communication, collaboration, and alignment across all levels of IWN. By maintaining transparency, celebrating progress, and engaging everyone in the journey, the organization will continue to strengthen its impact and advance its mission.

Progress Reports	Quarterly updates and annual summary	All Key Partners	Starting Fall 2027
Mid-Plan Review	Assess progress and adjust priorities	Board & Leadership	2028
Strategic Renewal	Begin next planning cycle	All Key Partners	2029