



Karis' Strategic Plan

Engagement Plan

Presented by

Strategic Initiatives &
Davis Pier Consulting

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DAVIS PIER

karis  **Disability
Services**

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Project Overview & Background

- Karis Disability Services (Karis) is a Christian faith-based, non-profit organization dedicated to serving people with developmental disabilities. **Karis aids nearly 3,000 families in over 70 communities across Ontario and Saskatchewan** and is also considering an expansion into Nova Scotia. Karis Disability Services is fostering a co-design approach to develop its next strategic plan. This process includes market research and a survey of potential clients, and extensive co-design engagements.

- **Davis Pier is supporting Karis to develop its next plan,** one that emphasizes co-design and collaboration with key partners to create a sense of shared purpose through collective effort. This process will include market research and a survey of potential clients, as well as guidance on engagement strategy and planning. Davis Pier will lead the facilitation of engagement sessions, synthesize and analyze data gathered, and assist in framing the new strategic plan and developing the first-year implementation plan.

Engagement | Purpose

- The purpose of the engagement plan for Karis Disability Services is to lay the **groundwork for meaningful, inclusive, and effective** co-design engagements in the development of the organization's next strategic plan.
- Each phase will focus on engaging key groups —including **Karis employees, self-advocates, families, caregivers, people supported, and key partners** —by gathering their insights, understanding their needs, and ensuring that the engagement process aligns with their perspectives and experiences.
- By fostering an inclusive dialogue, Karis aims to ensure that its future vision, mission, and strategic priorities are co-designed with the individuals and communities it serves, while promoting a sense of **ownership and active participation**.



Engagement | Objectives

Ensure Inclusivity and Accessibility

- Engage key groups—including Karis employees, self-advocates, families, caregivers, clients and key partners—to assess if the planned engagement methods, timing, and design are inclusive, accessible, and suitable for all participants, particularly those with developmental disabilities.

Gather Insights on Vision and Mission

- Collect valuable input from key groups to understand their perceptions, expectations, and aspirations for Karis' future vision and mission. This will help ensure that the strategic plan reflects the values and needs of the people Karis serves.

Identify Key Challenges and Priorities

- Identify and understand the unique challenges faced by families, caregivers, and self-advocates, particularly as they relate to the services and support provided by Karis.

Support Meaningful Participation

- Prepare participants for the upcoming co-design sessions by helping them reflect on how they can engage in the strategic planning process.

Promote Ownership and Alignment

- Foster an environment where individuals feel empowered, engaged, and aligned with Karis' strategic direction. This will encourage a sense of shared responsibility and commitment to the co-design process, while also identifying opportunities for people to volunteer and actively contribute to the Karis engagements.



EDIRA Engagement Principles

Purposefulness

Ensuring that engagement approach, topics and methods are designed with intention and aligned with our project objectives.

Inclusivity

Actively engaging diverse perspectives and ensuring all individuals feel valued and involved in the engagement process.

Co-Design

Co-design is at the heart of our engagement approach, fostering collaboration, inclusivity, and shared ownership.

Transparency

Maintaining open and honest communication with all involved, building trust through clarity and shared information.

Equity

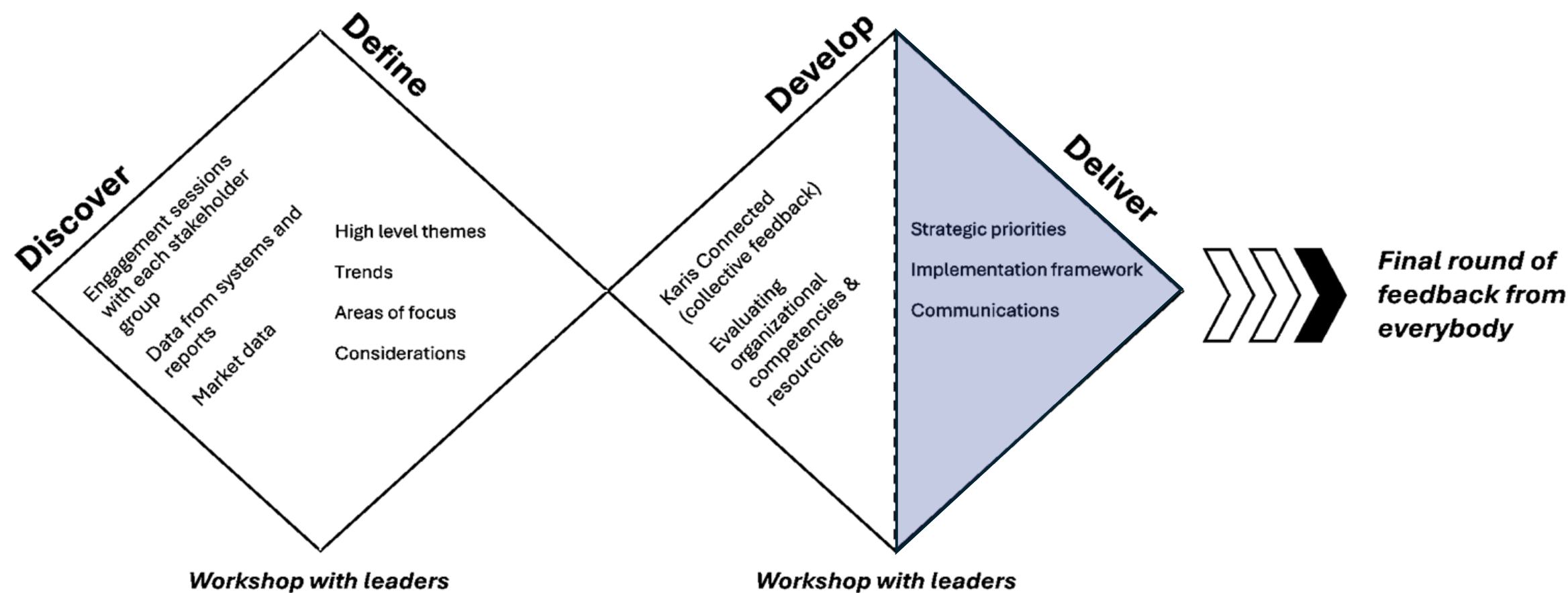
Promoting fairness by recognizing and addressing barriers to engagement, ensuring that all individuals have equal opportunities to contribute.

Learning

By fostering a culture of learning, we aim to stay responsive to emerging needs, refine our practices, and build on the collective knowledge.

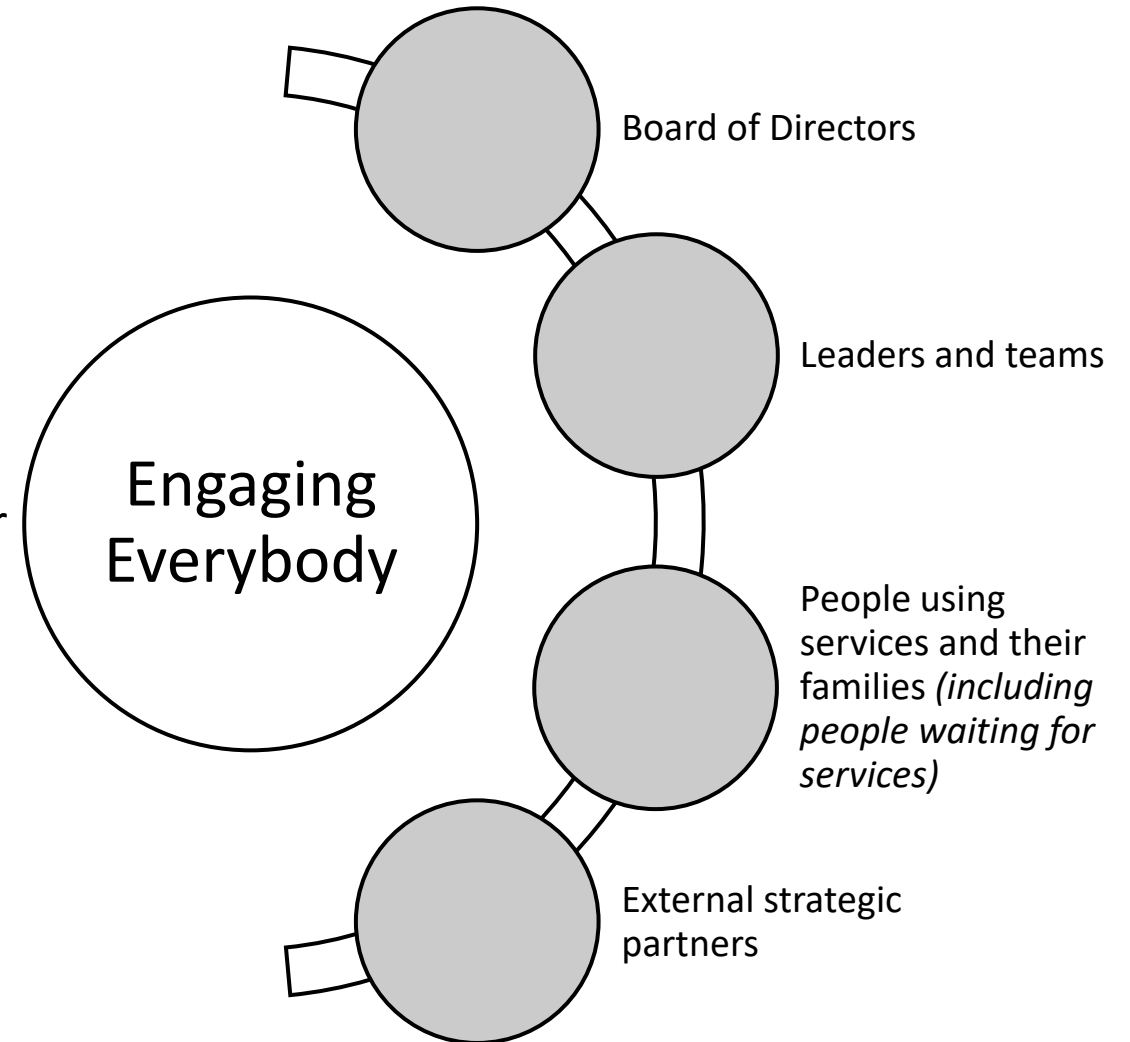
Engagement Framework

The following illustrates the methodology the project approach has followed and how information sources from Phase 1 (i.e., engagement sessions and market research) and Phase 2 (i.e., Karis Connected Everybody Engages Sessions) will ultimately inform Karis’s 3-Year Strategic Plan:



Engaging at every step of the process

- 1. First Phase (late January to early April):** dozens of facilitated conversations with staff, teams, people using services, and their families to listen and learn.
 - Feedback on Karis' Values, Vision, and Mission
 - Understanding needs, opportunities, and challenges
 - Data from research and systems
- 2. Second Phase (May to June):** staff, people who use our services, and family members invited to discuss and further influence our path forward.
 - Interactive discussions and roundtable conversations in 10 locations during ***Karis Connected Everybody Engages*** sessions.
 - Co-facilitated by Davis Pier and Self-Advocates



Phase 1 Engagemnet Plan



First Phase of Engagement | Key Groups



Karis Employee Groups

Who: Karis Employee Groups encompass **employees across various roles within the organization**, including program delivery, frontline staff, administrative support, strategic support, and leadership.

Why: In the first phase of engagement, it is essential to actively involve these employees in discussions about Karis' **future vision, mission, and strategic priorities**.

Engaging this key group early on helps to **foster a shared understanding and commitment** to the organization's goals.



First Voice

Who: The First Voice group includes **self-advocates involved with the Our Voice Matters Council** and local/regional chapters, as well as **Karis clients** who will be participating in the Karis Everybody Engages session.

Why: The purpose of the engagement in the first phase is to ensure that our **engagement methods, timing, and design** are inclusive and accessible for this population.

This engagement also provides an opportunity to **prepare participants by supporting them to reflect on how they want to engage** with us, as well as encouraging them to think about the contributions they wish to make to the Karis strategic plan co-design sessions.



First Phase of Engagement | Key Groups



External Partners

Who: External partners include **organizations, service providers, community groups, and key collaborators** such as OASIS, Ministry partners, PARN, CLO, Church Partners, and others.

Why: Engaging with external partners in the first phase will help us identify opportunities for stronger collaboration, improve communication channels, and gain a deeper understanding of the resources and services that can complement Karis offerings. Additionally, it will allow us to stay informed about shifts and trends in the sector, as well as uncover new opportunities for collaboration and/or advocacy that can add value for our organizations.



Families, Support Networks & Caregivers

Who: Families and caregivers include the **family members, support networks, and natural caregivers** of Karis clients.

Why: This early engagement will help us better understand the **unique needs and concerns families and caregivers face**, which can inform and shape the upcoming engagement sessions in May and June.

By connecting with this group beforehand, we can identify key topics of interest, such as support systems, care challenges, and how Karis can better align its services to meet their needs.



Engagement | Methods

Audience	Engagement Method	Engagement Topics	Timing
Karis Employee Groups	Virtual Meetings and In-person Meetings <i>Meeting employees where they are at</i>	<ul style="list-style-type: none"> Gather employee insights on Values, Vision, and Mission, with all key employee groups (i.e. DSPs, admin, leadership) Gather information on key challenges faced by employees and opportunities for improvement 	January-March (in progress) <i>Upcoming: the Karis Project Team will be engaging with DSPs and admin employees who have not yet been engaged.</i>
Our Voices Matter	Virtual Meetings <i>Co-working space with use of breakout rooms as appropriate</i> <i>Use tools such as Mural/google doc to capture insights</i> Post session survey	<ul style="list-style-type: none"> Insights into potential barriers to design around. Share initial list of design considerations and validate (i.e. transportation, compensation, sensory needs). Gauging interest in co-hosting the sessions Initial feedback on what Karis can do better, what is difficult, and what is missing. Work with them to recruit volunteers for May/June sessions Gather regional insights as required (survey) 	March

Engagement | Methods

Audience	Engagement Method	Engagement Topics	Timing
Karis Clients	Infographic Takeaway reflection activity	<p>Support Information Sharing and Awareness Building with Karis's Clients in Preparation for the May/June Engagement Session.</p> <p>Optional takeaway activities (not mandatory) should include visual cues and journaling prompts, such as:</p> <ul style="list-style-type: none"> • What do you like most about Karis and the help you get from them? • What is hard for you, and where would you like more help? • What is most important to you in your life, like having friends, people to help you, going out and doing things, or other things? • Are there things you want to do, but need help with? • Are there activities you want to do more of, but it is hard for you to do them? • What kinds of fun activities or programs would you like to see more of in the future? 	April-May
Direct Support Professionals	Email communications	<ul style="list-style-type: none"> • Support people with disabilities to register and prepare for the upcoming engagement sessions in May/June. 	April



Engagement | Methods

Audience	Engagement Method	Engagement Topics	Timing
Community Advisory Networks	Virtual Meetings	<ul style="list-style-type: none"> Discuss the most significant challenges families and caregivers face in their roles. Assess how well Karis understands the specific needs of the person being cared for. Identify which aspects of Karis's services could be improved to better support families and caregivers (e.g., communication, accessibility, flexibility, or specific care services). Gather input on what key topics or issues families and caregivers would like Karis to address in the upcoming engagement sessions. 	March-May
External Partners <i>OASIS, Ministry partners, PARN, CLO, Church Partners, and others</i>	Survey	<p>Survey to include the following questions (but not limited to):</p> <ul style="list-style-type: none"> What are the most pressing challenges you face in supporting individuals and communities similar to those Karis serves? What types of resources or partnerships would help enhance the services you provide and improve outcomes for individuals you support? What key topics or issues would you like Karis to focus on during the upcoming engagement sessions in May and June? Are there specific areas where greater collaboration between Karis and external partners could lead to more effective solutions for the people we serve? 	April



Phase 2 Engagement Plan



Karis Connected Everybody Engages

Karis is excited to host **10 co-design sessions across Ontario and Saskatchewan**, bringing together people supported, their families and support networks, and Karis employees to co-design our strategic plan.

These sessions build on the **comprehensive feedback and insights gathered in Phase 1**, continuing the co-design process we began together.

- The event schedule and format was designed with valuable **first-voice feedback from Our Voices Matter Council**, ensuring that self-advocate perspectives are embedded throughout.
- The topics for discussion were carefully selected to reflect the priorities of **all participants** and are grounded in the insights from Phase 1.

Phase 2 is about going deeper—shifting our focus from identifying areas for improvement and opportunities to envisioning the future and prioritizing what matters most in the coming years.

Karis Connected Everybody Engages | Objectives and Purpose

Karis Connected Everybody Engages will ensure that **every voice is heard, valued, and contributes** to shaping a shared vision and building a future-ready **3-year strategic plan** that reflects the needs, values, and aspirations of the Karis community.

Key objectives of the engagements are:



Empowering voices & shaping priorities

Create opportunities for people to contribute and influence key decisions.



Cultivating shared learning

Strengthen relationships and knowledge-sharing through an inclusive process.



Alignment with values & strengthening accountability

Ensure the strategic direction is rooted in core values and drives commitment.

Outcome:

A comprehensive engagement report with key findings and a 'What We Heard' Report to be shared with interested parties.

Karis Connected Everybody Engages | Who we are engaging

Karis Clients & Self Advocates

Why Engage?

The individuals who receive support from Karis are at the heart of everything we do. Their insights, experiences, and aspirations will help shape a strategy that directly reflects their needs.

Key Insights we seek:

We want to understand what aspects of Karis' support are most valuable, where gaps or challenges exist, and how services can be better aligned with their evolving needs and aspirations.

Families & Support Networks

Why Engage?

Families, caregivers, and support networks play an essential role in the well-being of those Karis serves. Their experiences will provide valuable perspectives on service quality, areas for improvement, and opportunities for greater collaboration.

Key Insights we seek:

We seek to learn how Karis can strengthen collaboration with families, provide better resources, and enhance overall support systems.

Karis Leaders & Staff Members

Why Engage?

The Karis team is instrumental in delivering high-quality support. Their firsthand experiences and insights will be critical in shaping a strategy that has impact at the service level.

Key Insights we seek:

We aim to gather input on operational improvements, staff support and training, and innovative ideas for service enhancement.



Karis Connected Everybody Engages | Ensuring an Inclusive & Supportive Event

Quiet Room – A designated space for attendees who need a break from sensory stimulation.

Handouts & Alternative Formats – Provide printed materials, large print, and digital versions for accessibility.

1:1 Opportunities – Offer individual check-ins or small group discussions for those who prefer more personalized engagement.

Floater Role – Dedicated team members available to assist attendees as needed throughout the event.

Visible Support Staff – Event staff and volunteers wearing identifiable t-shirts for easy recognition and assistance.

Incentives for Supporters – Recognizing and appreciating those who help make the event successful through small gifts or acknowledgments.



Agenda for Karis Connected Everybody Engages

The agenda is subject to change, our hope with to co-host these sessions with First Voice individuals.

Morning

Registration

- Visual Mural – What do you like most about Karis?

First Voice Kick-Off

- Welcome and MC remarks

Karis Welcome Remarks

- CEO/ED remarks
- Karis Video
- First Voice – what co-design means to me

Engagement Session #1

- Interactive Feedback Wall
- Stations based on pre-engagement topics (i.e., community inclusion, staffing recruitment/retention, etc.)
- Printed handouts available
- Offer space for 1-on-1s

Lunch

Fireside Chat w/ First Voice

- Potential topic: Supported Decision Making
- Potential topic: Nothing for us without us
- Potential topic: Community Inclusion
- Potential topic: Self-Advocacy

Afternoon

Engagement Session #2

- Part 1: Story Telling & Future Visioning
- Part 2: Card Sorting Activity
- Printable handouts available
- Offer space for 1-on-1s

Close Out Reflection

- What's one thing that is important to you that we should focus on?
- Envelopes and cards available

Participant Satisfaction Survey

- Printed surveys available
- QR codes on tables

Thank you & What's Next

- CEO

Tear Down



Co-Hosting with Self Advocates

Co-hosting with a self-advocate will bring authentic lived experience and diverse perspectives to the **Karis Connected Everybody Engages** session, fostering meaningful conversations, enhancing inclusivity, and ensuring the voices of people supported are at the heart of our work.

Key Principles for Co-Hosting

Equity & Partnership – Self-advocates are equal contributors, not token participants.

Respect & Inclusion – Create a space where their voice is valued and heard.

Accessibility First – Consider communication, physical, and digital accessibility needs.

Collaboration – Plan together, making sure self-advocates have meaningful input.

Flexibility & Support – Adapt based on needs and preferences, ensuring co-hosts are set up for success.

Roles Self-Advocates Can Play

Lead or Co-Facilitator – Presenting, sharing lived experiences, leading discussions.

Panelist or Storyteller – Offering insights through personal experiences.

Discussion Moderator – Facilitating breakout discussions and engaging participants.

Accessibility Advisor – Ensuring event format and materials meet diverse needs.

Welcoming & Closing Remarks – Setting the tone and wrapping up with key takeaways.

We will work with OVM to provide dedicated preparation and support, including practice sessions, visual aids, and co-host check-ins, to ensure self-advocates feel confident, empowered, and set up for success in their role.



Co-Host & Volunteer Preparation

To ensure the people involved in leading and supporting the engagement sessions are well prepared and feel confident in their roles and responsibilities for the day, it will be important to properly prepare all those involved in the sessions through orientation webinars, information sheets, and morning huddles on the day of the sessions.

Orientation Webinars

The orientation webinars will serve as an introduction to the Karis Connected Everybody Engages event, providing an overview of what engagement sessions will be like, who will be leading and supporting the event, and the responsibilities of roles at sessions.

This will involve virtual webinars for those involved in leading and supporting the sessions to have an introduction to the event and get their first questions answered.

Information Sheets

After orientation webinars and before engagement sessions, those leading and supporting the sessions will receive an information sheet detailing:

- A description of the engagement session
- Location of the event
- The roles involved and main responsibilities of the roles, with a focus on the role they will be serving as at the event
- A schedule with timing for the session and its activities

Co-Host & Volunteer Morning Huddles

Morning huddles at every engagement session with co-hosts and volunteer roles allows those involved in making the day a success to interact with each other, get their questions answered, and be comfortable with how the day will run.

This will involve:

- Meeting with self-advocate co-host to go through event flow
- Meet with other volunteers for role assignment and answering questions

Data Collection

The Karis Connected Everybody Engages sessions are designed with a variety of inclusive data collection methods, offering attendees multiple ways to share their experiences, insights, and perspectives with Karis. The information captured from attendees will allow Davis Pier to derive insights for Karis through a final Engagement Report. Through the following activities and engagement methods, attendees will have the opportunity to be heard by Karis:

Activities & Methods	Objectives	Output
Interactive Feedback Wall	Gather input from attendees on key topics, questions, and themes that will shape the strategic plan.	All information shared and collected from people supported, staff, and families, will serve as the raw data for the synthesis and dissemination of engagement results.
Topical/Themed Stations		
Designing the Future	Gather future visions from attendees, identify and prioritize key themes by collecting what matters most to attendees, and collect attendees most important priority for Karis’ future.	
Card Sorting Activity		
Close Out Reflection		
1-on-1 Discussions	Gather input from attendees in an individual check-in space or small group discussion and by collecting pre-engagement takeaway activity materials if attendees share back.	
Takeaway Activities	Gather attendees’ experience at sessions.	
Satisfaction Survey		



Celebrate Every Journey

60
Years

karis 
Disability Services