

SHANNEX™ | Leading
the way to
better
living.™

Strategic Plan

April 2018 - March 2023



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Lewis Hall, Parkland at the Lakes
Dartmouth, Nova Scotia



Message from the President

I am very pleased to share Shannex's 2018-2023 Strategic Plan. Our roadmap for the next five years represents a truly collaborative effort involving a significant amount of thought, planning and input from residents, families, employees and stakeholders.

As you will see, this input is reflected in new Strategic Directions that are relevant to our business and allow team members throughout the organization to play key roles in helping us deliver on our plan.

Shannex has been providing care and service to residents in communities in Nova Scotia, New Brunswick and Ontario for 30 years now, and I believe that every year we more fully realize our vision of *Leading the Way to Better Living*.

Because our Strategic Directions are ambitious, we created a structure that includes built-in accountability and measurement tools to keep us focused and organized. We have also taken care to be specific about our goals and measures of success and have included activities we call "enablers" to support us in delivering on this plan. We will follow a simple, but effective, Accountability Framework to guide our work and ensure that we are adapting as needed during our strategic plan window.

I'm excited about this new Strategic Plan. Our Strategic Directions are aligned with our core values and accurately reflect our areas of focus. I am confident that we have created a strong roadmap for the next five years and that it will guide us in achieving our goals. It will also support the growth and development of our team members as they deliver quality care and service to residents and families each and every day.

A handwritten signature in teal ink that reads "Shannon". The signature is fluid and cursive, with a long, sweeping underline that loops back under the name.

Jason Shannon

Our Vision



Our vision defines what success looks like for Shannex in the future. Across all communities, service lines, homes, campuses and departments, every person at Shannex shares one common vision:

Leading the Way to Better Living™

Our Mission



Our mission is our promise to residents and their families as we work every day *Leading the Way to Better Living*:

- Providing service excellence
- Treating residents as individuals by respecting their choices, independence and dignity
- Ensuring that capable and caring team members continue to be the foundation of our organization



Our Values



How we achieve our vision is guided by a set of core values that we rely on to make decisions, develop strategies and inform practices. Our values define what Shannex stands for and are central in all we do.

Residents First

We put residents first. We support resident independence and dignity by valuing their life choices and respecting their decisions.

Great People

We believe in our people. They are the spirit and foundation of our company. They deliver their best effort every day and, in return, we promise to invest in their success.

Improving Quality

We know there is always room to improve. We are committed to improving quality through leadership, innovation and perseverance.

Trusted Partnerships

We know we cannot do it alone. We strive to enhance our services by building trusted partnerships with team members and stakeholders who share similar values.

Being Accountable

We are accountable to our residents and partners. We are committed to managing our physical, environmental, financial and human resources ethically and responsibly.



Our Strategic Directions

Shannex has identified four Strategic Directions that will guide the organization over the next five years. These directions capture our collaborative areas of focus as we pursue our vision of *Leading the Way to Better Living*.

Service & Care

Create conditions that enhance our ability to deliver resident-directed care and promote service excellence.

Engaged Employees

Engage our team members and be the employer of choice everywhere we operate.

Research & Innovation

Lead and support innovation that improves our workplaces and benefits seniors in our communities.

Sustainable Growth

Grow the company to fulfill future senior needs while expanding and enhancing our existing communities.



Service & Care

We are passionate advocates for continuous improvement and innovation. We actively collaborate with residents and families to help them make informed decisions about their care and service based on personal needs, beliefs and life goals.

We will develop tools, processes and environments to support and strengthen this collaboration throughout the organization and continue on our journey of superior service excellence to ensure that residents have a consistent and unique experience across all lines of service.

Major Initiatives

- Integration of service excellence, philosophy of service and business processes
- Resident and family online portal
- Interdisciplinary care planning improvements
- Best practice strategies for clinical risk areas such as pressure injury prevention and management

5-Year Goals

Create conditions that enhance our ability to deliver resident-directed care and promote service excellence.

- Improve our technology and processes so that every resident and family member has a positive experience entering and transitioning through our Continuum of Service
- Consistently achieve high satisfaction rates for care and services received, based on Resident Satisfaction Survey results (95% or higher)
- Increase the quality and transparency of care plans for residents and their Substitute Decision Makers (SDM)
- Become nationally recognized for service excellence



Engaged Employees

Great People are the spirit and foundation of our company. They deliver their best effort every day. To reinforce both this commitment and our belief in our employees, we adopted *Great People* as a new organizational value in 2018.

We will create meaningful careers that promote employee engagement and drive productive, healthy and safe workplaces.

Major Initiatives

- New abilities management program
- Long-term recruitment strategy (including employer brand and immigration components)
- Optimization of nursing leadership roles
- Employee retention strategy (including improved benefits and engagement programs)

5-Year Goals

Engage our workforce and be the employer of choice everywhere we operate.

- Improve safety culture by increasing safety survey results to 95% or higher
- Reduce lost days from injury by 30%
- Increase the number of employees who would recommend Shannex as a place to work, based on the Employee Satisfaction Survey (85% or higher)
- Retain 85% of newly hired employees past one year
- Improve the consistency of staff levels while maintaining continuity of care
- Be identified by a recognized national program as an employer of choice



Research & Innovation

At Shannex, we are committed to research and innovation that improve how we deliver care and service. This will be achieved by maintaining our focus on the implementation of quality improvement projects and increased investment in technology deployment.

We will expand our commitment over the next five years by clearly defining our research goals, strengthening our technological capabilities and creating a strong culture of innovation at all levels of the organization.

Major Initiatives

- Quality Improvement Program enhancements
- Wearable technology for resident care
- Comprehensive and integrated clinical systems
- Public reporting of long-term care quality indicators
- Develop research strategy

5-Year Goals

Lead and support innovation that improves our workplaces and benefits seniors in our communities.

- Leverage technology and processes to equip staff with resources that provide the best possible information about residents
- Meet or beat Canadian benchmarks on long-term care quality indicators
- Receive at least five research grants in joint submissions with our partners
- Perform in the top 10% for resident Quality of Life rating in our sector



Sustainable Growth

During our 30 years of care and service to residents, we have learned a great deal about how to help people live their best lives.

As we expand to meet the growing needs of seniors in our communities, we will invest in the right resources to accommodate this growth, continuously improve existing locations and be recognized as the leading provider of quality senior living in every market where we operate.

Major Initiatives

- New developments in Ontario and New Brunswick
- Ontario occupancy strategy
- Brand marketing strategy
- Corporate support structure
- Execution of Asset Lifecycle Management strategies

5-Year Goals

Grow the organization to fulfill future community needs while expanding and enhancing our existing locations.

- Receive high Resident Satisfaction Survey ratings on whether residents would recommend living in a Parkland or Shannex community to others (95% or higher)
- Meet or exceed all five-year financial plan targets
- Meet or exceed asset management standards at existing facilities
- Successfully execute our growth plan without affecting service delivery in existing operations



Enablers

This strategic plan is exciting and ambitious. We know that to ensure success we must plan carefully and align the right resources and structures, or “enablers”, to position us properly to accomplish our goals.

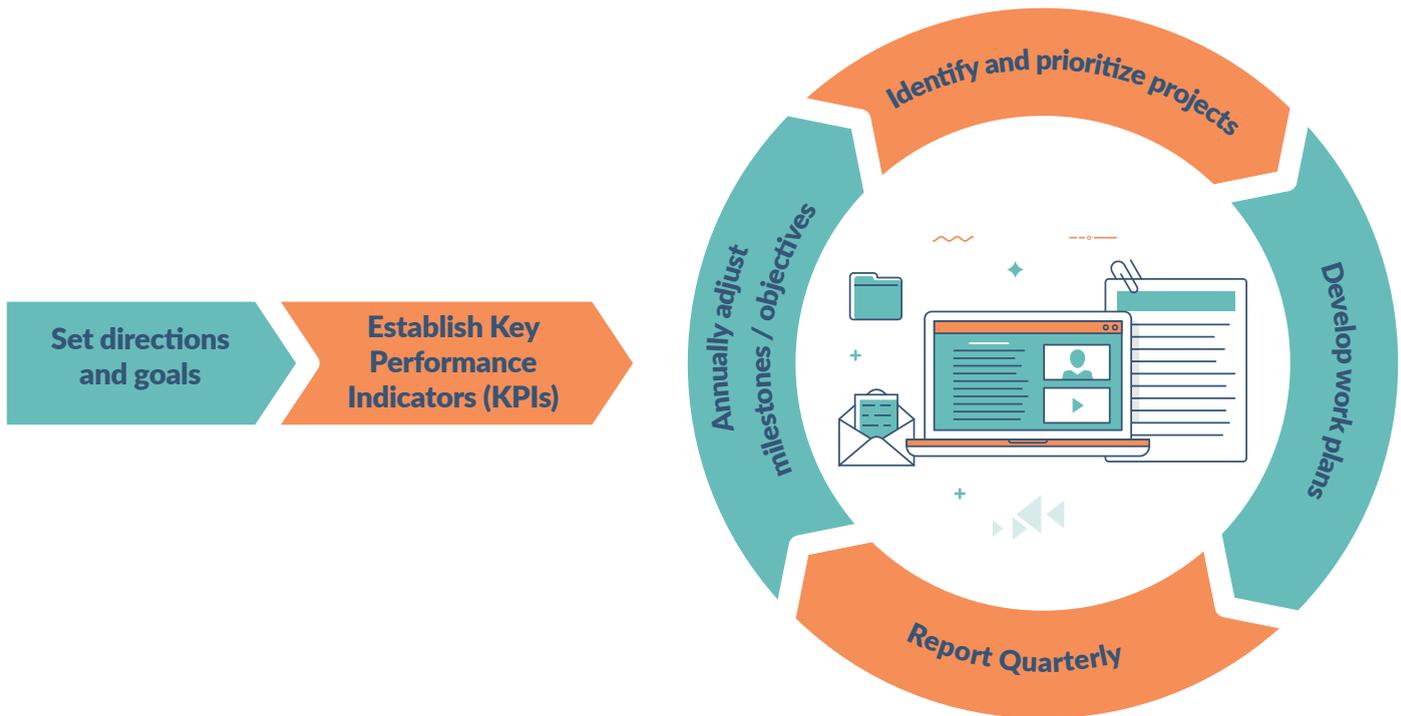
We spoke to hundreds of team members, residents and families during the consultation phase of developing this plan. One of the things we heard was that we need to be sure we are managing projects and change

effectively. That’s why we are enhancing our project and change management support services. We will establish a structure that enhances how change is communicated to a diverse team of people and implemented across our complex organization. This will allow for smoother transitions, opportunities for greater engagement with residents and team members and clarity around the approval, prioritization and execution of the many moving parts of this plan.



Accountability Framework

The accountability framework recognizes that, over the course of five years, many things can change. By monitoring and reporting on our progress, we will have the right information to guide us if we need to consider making adjustments to reflect changing realities and to ensure that we are successful in executing on our Strategic Directions.



Measurements

One of our organizational values is *Being Accountable*. This commitment guides us to ensure that we have appropriate tools in place to measure our progress as we deliver on our Strategic Directions. We will be tracking these indicators quarterly and reporting on various key performance indicators and other

measurements to evaluate the impact our efforts and projects are having on the broader goals we have set for ourselves. We will monitor these efforts regularly, which will allow us to shift direction and adjust plans quickly. Some of the measurements we will be reporting on are presented on the next page.



Service & Care

- Results from Resident Satisfaction Survey and Resident Move-In/Transfer Survey
- Resident safety and clinical outcomes post-admission or at transfer
- Results from quality and completeness audits of resident care plans
- Access for Resident/Family/Substitute Decision Maker to care plans

Engaged Employees

- Team member responses to annual Safety Survey
- Average lost days from employee injury
- Employee Satisfaction results from quarterly Shannex Listens: Employee Engagement Survey
- New employee retention rate (after 12 months of employment)
- Staffing level outcomes including hours of care per resident
- Standing with a national employer of choice accrediting agency (specific agency to be determined)

Research & Innovation

- Research and other outcomes resulting from technology pilots and implementation
- Canadian Institute for Health Information (CIHI) Quality Indicators for Long-Term Care
- Profile and status of research grant applications
- Resident satisfaction and participation in the interRAI Resident Self-Reported Quality of Life Survey

Sustainable Growth

- Resident Satisfaction Survey results
- Company financial performance
- Asset Management Campus Scorecard results
- Long-term capital plan status and progress



A Caring Community

Shannex and Parkland communities are located in vibrant and diverse neighbourhoods throughout Nova Scotia, New Brunswick and Ontario, and we believe strongly in establishing *Trusted Partnerships* that allow us to give back to these communities where residents and team members live and work.

But we don't do any of this on our own. We are privileged to work with hundreds of volunteers who generously donate their time to help us deliver on our mission, working tirelessly to ensure residents find purpose, joy and dignity every day.

Our community work focuses on key areas that allow us to be strong advocates for residents and families, recognize the value and richness seniors bring to our lives, promote safe and sustainable workplaces, and offer opportunities for our team members to give back.

We are proud to work closely with educational institutions like Dalhousie University, University of New Brunswick, Université de Moncton and Nova Scotia Community College and have long-standing partnerships with the Alzheimer Society, the Mental Health Foundation of Nova Scotia and the United Way.

We also care deeply about environmental sustainability and have introduced a number of important measures across the organization to reinforce our environmental stewardship. These have included energy efficiency initiatives such as adopting low-water use fixtures, using chemical-free cleaning systems and implementing waste reduction and recycling programs. As part of our previous strategic plan, we developed a detailed asset management plan that reports on how our sites monitor energy, water and waste across the organization. Data collected allows us to actively understand and adjust our approach as needed to ensure we are optimizing operations and protecting natural resources to the best of our ability.



We are proud of our long-standing partnership with the Alzheimer Societies of Nova Scotia and New Brunswick.



Shannex has two Collaborative Learning Centres. One at Faubourg du Mascaret in partnership with Université de Moncton, and one at Maplestone Enhanced Care in partnership with Dalhousie University.



The Maplestone Volunteer Auxiliary has been enriching the lives of residents since 1983 and continues to be a valuable part of our team.

Our Continuum of Service

At Shannex, we understand that people value choice and independence in their lives. This is the foundation of our Philosophy of Service and our commitment to residents and their families.

When a resident comes to live in one of our communities, it becomes their home. They can continue to live a vibrant and comfortable life full of meaningful experiences in an engaging atmosphere with planned social activities, dining, fitness and care.

Our Continuum of Service recognizes that a resident's needs may change over time. From the time they arrive in their new home, the continuum ensures we are able to easily support them with service and care options in the event greater help is required over time.

Shannex Care at Home offers one-on-one assistance to support people in the comfort of their own homes. Shannex's Retirement Living service brands, Parkland and Faubourg, offer residents an exceptional lifestyle in beautifully appointed private suites with services such as fine dining, housekeeping, care and full access to campus amenities and social activities designed to provide a holistic approach to living well. Shannex Enhanced Care offers resident-directed continuing care options in communities across our regions.

Lifestyle	Independent Lifestyle	All-Inclusive Lifestyle	Supportive Lifestyle
Divisions	Home Care	Retirement Living	Community-Based Nursing Care
Brands			
Offerings	<ul style="list-style-type: none"> • Daily Activity Support • Light Housekeeping • Appointment Assistance • Dietary Support 	<ul style="list-style-type: none"> • Independent Apartments • Apartments with dining options and housekeeping • Assisted Living and Memory Care • Enriched Care • Short-term Stays 	<ul style="list-style-type: none"> • Nursing Care • Palliative Care

Strategic Plan Summary

SHANNEX™

Vision

Leading the Way to Better Living™

Mission

Providing service excellence, treating residents as individuals, ensuring a foundation of caring and capable team members.

Strategic Directions

Service & Care

Create conditions that enhance our ability to deliver resident-directed care and promote service excellence.

Engaged Employees

Engage our workforce and be the employer of choice everywhere we operate.

Research & Innovation

Lead and support innovation that improves our workplaces and benefits seniors in our communities.

Sustainable Growth

Grow the company to fulfill future community needs, while expanding and enhancing our existing locations.

Values

Residents First

Great People

Improving Quality

Trusted Partnerships

Being Accountable



Shannex is pleased to be a part of many vibrant communities in Nova Scotia, New Brunswick and Ontario. We look forward to joining more exciting communities in the future.

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