



ShannexTM
LEADING THE WAY TO BETTER LIVINGTM

Leading the way

Strategic Plan

April 2023 - March 2028



Cover: From left; Jack, Clayton and Jessie, Parkland residents

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Message from the President

This year marks our 35th year in operation and the beginning of another five-year strategic plan; a period I'm confident will see some of the greatest advancements in our sector.

Emerging from a pandemic that gripped healthcare, and particularly seniors' care worldwide, we've had to advocate for investment, we've changed our approach to recruitment and retention of talented individuals, and we've forced and accelerated innovation like never before. The pandemic created challenges we will never forget, but like most things under pressure, it created conditions for transformation, and the timing of this strategic plan couldn't be better.

I believe one of the greatest opportunities for our organization and our sector, is the attention being paid to seniors, including all aspects of their health and wellbeing. For Shannex, we'll continue to move forward with confidence and commitment to make life better for those who choose to live with us. We'll also participate in larger discussions on what is needed to support people as they age in this country. The reality is that we're approaching a critical point where the supply-demand ratio for dedicated seniors' housing is shifting rapidly at a time when our health system is struggling to deliver the most basic of services. Quality accommodations and care services for an aging population is needed and Shannex is working to evolve



and strengthen our existing operations while adding new service offerings to meet the needs and the wants of seniors.

People are living longer. The idea that people “retire” at a specific age is outdated. At Shannex, we're embracing the long life, the engaged and contributing life. We're challenging ourselves and our partners to work together to create a longevity-ready society, one that is inclusive and focused on the opportunities of this wonderful new reality.

This strategic plan keeps us on the path to realizing our vision of *Leading the Way to Better Living™* and stays true to our values of *Residents First, Great People, Improving Quality, Trusted Partnerships* and *Being Accountable*. We're going to conduct our work safely, responsibly, and inclusively. We'll continue to innovate, and we will invest in new and existing technologies

to find improved ways of providing service and care. We'll also expand our knowledge and perspectives by embracing diversity inside and outside our organization.

This strategic plan is about advancing our commitments in real and measurable ways. The five strategic directions we present in our plan are accompanied by expectations, along with ambitious five-year goals to measure our success. We know we are going to learn a few lessons along the way, and we may have to adjust our sails from time to time but we'll look forward to reporting on our progress annually and talking about successes as well as challenges.

This plan is for our organization and for the people and communities we serve. Our founding vision to improve life for seniors remains the hallmark of the organization and will continue to motivate our leadership and every one of our team members as we strive to accomplish the goals of this plan.

I'm proud of our path to this point, and I'm excited for the future. We know we can't do this alone and we look forward to bringing all our stakeholders along in our journey. Thank you for your continued interest and support in our endeavors.



Sincerely,
Jason Shannon

Our Values

To achieve our vision of *Leading the Way to Better Living*, we follow five core values in our pursuit of excellence in everything we do.

- Residents First
- Great People
- Improving Quality
- Trusted Partnerships
- Being Accountable

Guiding Principles

While our vision and values shape who we are and guide us as an organization, our *Guiding Principles* are in place to inspire every team member in their actions and words to deliver exceptional service and care every day.

- We are Compassionate
- We are Honest
- We are Professional
- We are Safe

Resident Wellbeing

Our new strategic plan was thoughtfully developed through extensive consultation and engagement with residents, families, team members and trusted partners. With five strategic directions as our guide, we will deliver on an ambitious plan to continue on our journey toward *Leading the Way to Better Living*.

The wellbeing of our residents encompasses all aspects of their lives. Wellbeing includes physical, social, intellectual, professional, spiritual and emotional dimensions so that residents are living their best lives with us. It also means residents are safe in their environment and in the care and service we provide.

We will elevate the voice of the resident; we will treat them with respect, protect their dignity, see them, hear them and continually improve upon our delivery of resident-directed care and service.



STRATEGIC EXPECTATIONS

Resident quality of life is upheld and enriched by living with us

Residents are meaningfully engaged and enjoy their community through recreation and social activities

Resident clinical and safety outcomes meet or exceed national standards

Our services positively impact resident wellbeing

Residents have an exceptional food and dining experience

FIVE-YEAR GOALS

Achieve 80% average positive response rate on Quality of Life survey

Achieve 70% score within the Engaged Social Life category on Quality of Life survey

Canadian Institute of Health Information (CIHI) indicators meet or exceed national benchmarks for all nursing homes

We understand, measure and implement practices that positively impact resident frailty

Achieve a 5% year-over-year improvement within the Food category on Quality of Life survey



LEADING THE WAY The Resident Voice

Initiatives like the Harbourstone Behavioural Innovation Pilot is one of the ways we'll challenge ourselves to think differently, introduce new expertise and use data effectively to ensure every resident is safe, well and enjoys their home no matter what challenges they face.

“

We ask residents what they like. We ask them about their background and what brings joy to their life. By creating personalized programs, residents are happy, fulfilled and settled in their home.

Kyle Richardson, Regional Manager, Enhanced Care, Sydney, NS

Read more > shannex.com/StrategicPlan

Employee Experience

The health and happiness of our team members matters to us. We are focused on creating fulfilling experiences for our *Great People* throughout all stages of their work life with us.

Safe, supportive, inclusive and respectful environments that prioritize the wellbeing of every team member make us an employer of choice everywhere we operate.



STRATEGIC EXPECTATIONS

Employees are safe and well

Employees feel included, respected, valued, and appreciated

Employees stay and grow their career with us

Our employees speak highly of us

We attract great people who want to work with us

FIVE-YEAR GOALS

Safety Profile Score is above 90%

Employee engagement score is 85% and our diversity, equity, inclusion and belonging strategy is developed, implemented and measurable

We retain 85% of our employees annually, and 85% of our new hires stay with us more than six months

Eighty-five per cent (85%) of our employees recommend us as a place to work on the Employee Engagement survey

Ninety per cent (90%) of open positions have an accepted offer within 30 days

LEADING THE WAY

Great People Grow With Us

We love to see our *Great People* grow here and we will continue to be committed to ensuring they have our full support by providing safe and inclusive workplaces where they are recognized and rewarded with opportunities to grow their career and work with purpose everyday.

“

I'm grateful for the support I received to grow my career here. I feel like what I'm doing is meaningful. I'm honoured to be there for residents and their families and I love creating amazing experiences that build trusting relationships.

Jovana Bailey, General Manager, Parkland on Eglinton West, Etobicoke, ON



Read more > shannex.com/StrategicPlan

Service Excellence

Residents, families, employees, volunteers, partners, and the greater community must have trust in us to deliver on our responsibilities with compassion, honesty and professionalism while maintaining the highest safety standards.

We earn this trust by consistently delivering exceptional experiences with service excellence that is inspired by our commitment to placing residents first.



STRATEGIC EXPECTATIONS

People want to live with us

Residents have an exceptional experience during move-in and throughout the continuum

Service delivery standards are consistently upheld by all sites

Shannex is a trusted organization and partner

Shannex's *Great People* uphold the *Guiding Principles*

FIVE-YEAR GOALS

Shannex is a preferred long term care provider, and our retirement living occupancy targets are met

A move-in survey is made available to all residents and completion targets are achieved. Eighty-five per cent (85%) score is achieved on Quality of Life survey questions that residents recommend living with us and feel their needs are met

Eighty-five per cent (85%) of retirement living brand standards are met and long term care licensing and accredited status is maintained for all communities

An organizational Trust Measure is established and targets are set and achieved

Achieve 75% positive response on questions indicating relationship with team members on Quality of Life survey



LEADING THE WAY Exceptional Experiences

Organizational standards of excellence such as our *Service Excellence Standards* and *Guiding Principles* will ensure residents, team members and trusted partners enjoy a consistently exceptional experience that is delivered through a shared responsibility and an approach that is open to new ideas and collaboration.

“

We develop special bonds with residents because we have the privilege of working in their home. Getting to know them and understanding their stories and preferences inspires us to ensure they are having an outstanding experience whether they're enjoying a light breakfast or a three-course meal.

Dana Schiefer, Chief Culinary Officer

Read more > shannex.com/StrategicPlan

Healthy Business

Ensuring we run a healthy business means we are here for the future. We are committed to growing, adapting, evolving, innovating, and improving. It means we will invest in our company, and we will be fiscally responsible so that we can deliver what our residents, team members and communities need to thrive.



STRATEGIC EXPECTATIONS

We are financially stable and we meet our obligations

We meet the increased demand for accommodations and services for elders

We are responsible to our community, give back through our *Great People*, sector leadership, partnerships and the Shannex Cares Foundation

We have a culture of innovation that improves the lives of residents and team members

Our properties and assets are consistently well maintained

FIVE-YEAR GOALS

Financial targets are met

Demonstrated contributions to alleviating pressure within the greater health system

Community giving targets are met through Shannex Cares program

Evidence demonstrates that innovation is present in all aspects of our organization

Quality of Life, Building and Property Maintenance Standards and Asset Management scorecards achieve 90%

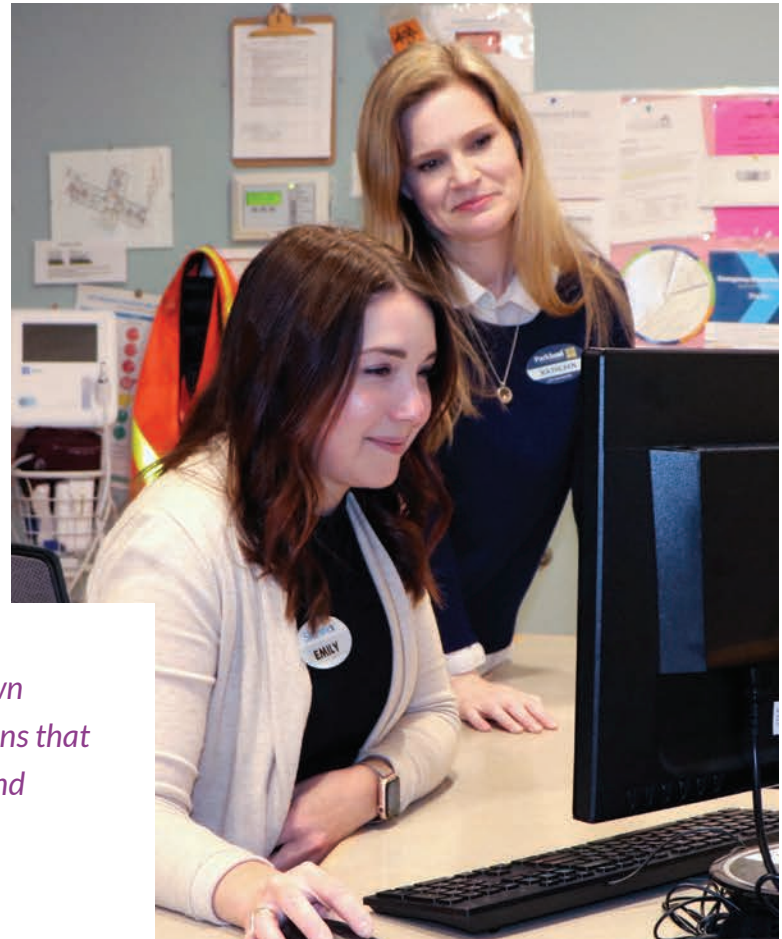
LEADING THE WAY Here for the Future

The Shannex Insights Lab is just one example of the many ways we're committed to innovation that improves the lives of seniors, creates better conditions for our team members and contributes to quality care. Over the course of the next five years, we'll play a leadership role in developing age-friendly communities, sector solutions that support the healthcare system and we'll continue to support communities where we operate.

“

The Shannex Insights Lab harnesses data from our own residents and team members to help us create solutions that enhance the ways we deliver individualized service and quality care.

Kathleen Norman, Senior Director, Performance and Innovation



Read more > shannex.com/StrategicPlan

Environmental Stewardship

We recognize that we must take steps to increase our commitment to protecting the environment with an action plan that transforms the way we prioritize sustainability.

We will create organizational policies and practices and invest in resources that engage every person who lives and works with us, empowering them to make a difference toward protecting our planet.

STRATEGIC EXPECTATIONS

We reduce our greenhouse gas emission and are energy efficient

We divert waste from landfills

We manage our water consumption using best practices

We source materials and purchase goods responsibly and sustainably

Our building designs and standards are environmentally conscious

We grow and support a community of team members and residents who are environmental stewards



FIVE-YEAR GOALS

Maintain ISO 50001 certification and reduce energy intensity by 5%

Achieve an organizational diversion rate of 30%

Record minimal variation and best practice performance in our water usage intensity metric (WUI) across all communities

Align with ISO 20400:2017 – Sustainable Procurement Standards

Each new building has lower energy intensity (GJ/m²) and lower GHG emission per resident

One hundred per cent (100%) of our communities have a Green Team or Green Team function



LEADING THE WAY

Protecting the Environment

Programs and activities like our Community Green Teams are examples of the collaboration required to help us realize change. When all team members and residents work together, we'll be able to identify and action initiatives that make a difference in our own communities and the entire planet.

“

We all need to do our part to protect our planet. It will take the efforts of many, but if we work together, I'm hopeful for the future.

Maureen Banyard, Resident, Parkland at the Gardens and Green Team member

Read more > shannex.com/StrategicPlan

Measurement and Reporting

The success of our strategic plan will be rooted in the awareness and support of our *Great People*. That’s why, we’ve clearly articulated and communicated each of our five strategic directions, associated expectations and five-year SMART goals. Executive leaders assigned to each direction will oversee annual priority and goal-setting processes. Progress toward these goals through quality improvement initiatives, projects and operational work plans will be monitored through quarterly scorecard reporting. Teams will also have access to quality improvement, project and change management expertise and structures to support their work.

Along the way, we’ll share results annually through a report to community that will track our progress against the strategic directions and to reflect our environmental, social and governance impacts.

Recognizing that many things can change over the course of five years, we’ll use a quality management and accountability framework that assesses progress through regular analysis and reporting and considers external factors and other influences. This way, we can make adjustments as needed during our annual planning cycle to keep us appropriately focused.





Our Shannex Cares community program seeks to strengthen the strong interconnectedness between the people who live and work with us and the greater community through partnerships, access to funding and the sharing of knowledge and resources. Specifically, we prioritize support in areas that reflect the values of residents and team members.

While we have plans to grow the funding support we offer, we currently have two core funding sources:

Community Spirit Grants: Awarded to community organizations that are taking action to improve the lives of seniors.

Great People Give Donation: Team members nominate and vote for groups making a difference in the community. Selected nominees receive a donation.

Read more > shannex.com/ShannexCares



How we are making a difference

- We empower our *Great People* with programs and initiatives inspired by them and with tools to make a difference.
- We share information and resources that improve the lives of all seniors who live with us, and in the greater community.
- We partner with others who are doing similar work to provide support and amplify our impact.

Strategic Summary

Our Vision

Leading the Way to Better Living™

Our Strategic Directions

1

Resident
Wellbeing

2

Employee
Experience

3

Service
Excellence

4

Healthy
Business

5

Environmental
Stewardship

Our Guiding Principles

We are
Compassionate

We are
Honest

We are
Professional

We are
Safe

Our Values

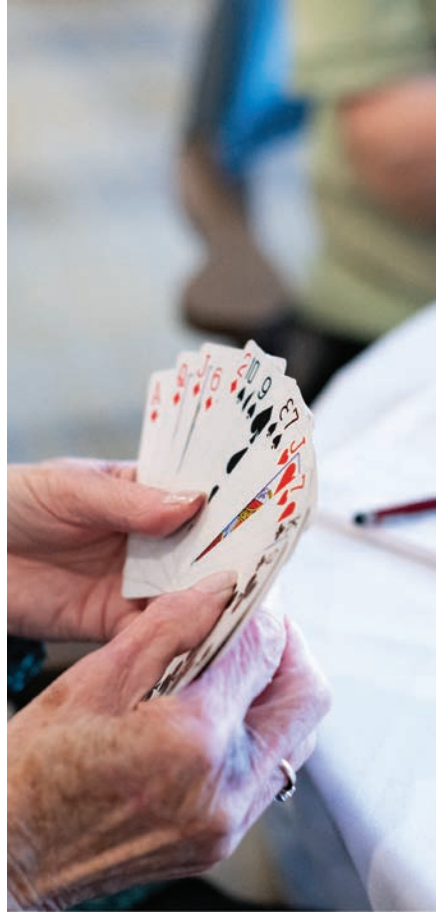
Residents
First

Great
People

Improving
Quality

Trusted
Partnerships

Being
Accountable



Shannex™



Parkland™
LIVE YOUR BEST LIFE



FAUBOURG™
du Mascaret

Shannex™
ENHANCED CARE

Shannex
CARE
AT HOME

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