



***Friends House Retirement Community, Inc.
2021 Grant Application
Seeking support for site wide
Montessori Lifestyle Program***

Executive Summary

Friends House Retirement Community, Inc. (Friends House) seeks to partner with Friends Foundation for the Aging (FFA) to implement a Montessori Lifestyle Program throughout the Friends House community. Friends House humbly requests a grant award of \$35,100 to assist us with this valuable program.

Brief Statement of the Organization’s History and Competence

Friends House Retirement Community, Inc. is a nonprofit Continuous Care Retirement Community (CCRC), licensed by the State of Maryland and originally under the care of the Baltimore Yearly Meeting of the Religious Society of Friends. Its mission is to create a caring community that connects residents and other seniors, volunteers and staff in a way that nurtures the physical, mental, emotional and spiritual wellbeing of each of its members. Friends House seeks to offer an affordable and fulfilling lifestyle for older persons of diverse background, economic means and abilities in a safe and caring environment. Friends House Nursing Home, part of Friends House Retirement Community, Inc. is a 5-star facility per CMS.

Recent History

Friends House has made the commitment to implement Montessori-Based Dementia Programming on our campus as a systematic approach to enhanced care for residents with dementia. Nearly half of people over 85 years of age are afflicted with dementia. The average age of our residents upon admission is 82, therefore most of our residents come to us with some sort of cognitive impairment; and those who begin their stay with us without such problems develop them over time.

In the original expansion plans of Friends House, we had hoped to build a Memory Care Wing. Under the leadership of a new CEO, Philip Burkholder, the strategic thinking has shifted. “Why build a building, when we could expand our culture of caring to include Montessori Inspired Lifestyle throughout all of our work, in every building, across the entire Community?”

Friends House memory care community “aspires to be person-centered, the kind of environment where residents know their neighbors, care for each other, collaborate with caregivers in sustaining their environment, connect to families and outside communities, and maintain agency in their lives. This is a Montessori Inspired Lifestyle Credentialed Community, the pinnacle of memory care, the careful combination of evidence and empathy.”

Project details

What problem are you addressing?

The “Montessori Method” of education was invented in 1897 for special needs children, but has since gone mainstream and is even being used to help manage the symptoms of older adults with

Alzheimer's disease and related dementias. The Montessori Method is anchored in the following ideas:

- Change the environment to suit the individual
- Allow freedom within a structure
- Respect a person's personality and history
- Individuals benefit by serving a community

Think about it this way: People with dementia do not want to be bossed around; like most of us, they want to be useful and to contribute. The Montessori Method reduces feelings of loneliness, boredom, and apathy by engaging with someone's skills in a productive way.

Friends House seeks to involve the entire Friends House Retirement Community in the Montessori Lifestyle Program. The program will include the nursing home, rehabilitation unit, assisted living and all independent living departments. The entire staff from CEO to housekeeping and grounds workers will train in the Montessori Method. Montessori Method makes aging a better process. Our goal is for Montessori Method to become part of the culture for employees (from onboarding until retirement) and residents no matter what part of the campus they live in.

The focus is on what a person *can* do, not what they cannot do. All of our residents can still learn things. Memory loss happens at all levels of senior care. By becoming a certified Montessori Inspired Lifestyle organization, we hope to make all stages of aging a better process. We expect to have residents feel more at home, more valued and therefore have less reason to wander. Montessori environments can also result in the reduction of psychotropic drug usage. (*The Elder Magazine*)

Evidence of need, why this solution was chosen

Montessori for Dementia is a new way to deliver care, which requires us to change all we thought we knew about dementia and providing care for people living with dementia. Montessori for Dementia focuses on supporting both the person and the environment, which is adapted to support memory loss and independence. We are unable to change the terrible effects of dementia but by embracing Montessori principles and implementing environmental adaptations, residents will be able to make meaningful contributions (including meaningful activities, roles and environmental cueing) we can circumvent the dementia. The result is that people living with dementia are able to make meaningful contributions to their community, engage in meaningful activities in addition to having the opportunity to maintain and even restore function. The approach is flexible, innovative and grounded in research. Today, active programs using the Montessori Method for persons with dementia can be found in more than 19 countries.

How the Montessori Method Works in dementia care: The century-old philosophy invites people to be active. They have a role within the community from setting the table at meals or decorating a family room. (Patricia Corrigan, 2020) A few examples:

- Residents in memory care facility in Grand Rapids, Mich., create flower arrangements, organize tools and sort through a seashell collection.
- At retirement community in Bend Ore., individuals with cognitive impairment brew craft beers.
- An educational service agency in Baton Rouge, LA holds parties where family caregivers and their loved ones with Alzheimer's disease can mingle.

The Demographics of those the program will serve:

Our community of Friends range in age from 61 to 107. Their backgrounds are diverse. There are men, women, and couples, from several countries. Residents have a varied racial designation and diverse sexual preferences. Friends House welcomes members of the LGBTQ+ community.

What actions will you do?

Friends House will contract with Monarch Pathways, (an affiliated education and consulting arm of the Center of Applied Research in Dementia) to coach our staff and assist in a true culture shift at Friends House across all departments. Monarch Pathways assists organizations working with seniors to become accredited Montessori Inspired programs. The accreditations are at the levels of Gold, Silver or Bronze.

Our goal is to implement a community shift to a Montessori culture, including all staff, residents and families and to attain a Bronze rating for the entire Friends House Retirement Community (nursing home, assisted living, rehabilitation, independent living) within a year. Monarch Pathways will improve and sustain the skill level of supervisory staff relating to front line employees in the following areas: interpersonal skills, problem solving and educating/teaching the use of Montessori Principles. Seven members of the senior staff will be actively engaged in the development and implementation of the program. Monarch Pathways will also introduce Montessori inspired principles to all staff and residents. Friends House will be the first senior care CCRC to adopt a Montessori Inspired Program and to attain a bronze accreditation rating in the state of Maryland. There are three phases of implementation:

Phase One: Data Gathering and Plan Development. Friends House will open its books to Monarch and look at the current data figures and reports related to staff and resident turnover and accident/injury data. Monarch Pathways will also conduct interviews with core leadership. A work plan for program implementation will then be developed based on the data collected. A Gallup Q12 Employee Engagement Questionnaire will be part of Phase One. Testing of participants will be done throughout learning modules and then the participants will build on what they learned and move to the next module. Following each module staff will work together to implement what they have learned.

Phase Two: Monarch Pathways will guide Friends House leadership through six modules: Communication, Relationship, Encouragement, Accountability, Teaching/Training and Engagement. In-person learning and zoom; day seminars or shorter classes will be conducted. Testing of participants will be done throughout learning modules and then the participants will build on what they learned and move to the next module. Following each module staff will work together to implement what they have learned.

Phase Three: Monarch Pathways will continue working with staff and begin to include residents and family members in the training. Staff, board members, and resident volunteers will be a part of the program. A Gallup Q12 Employee Engagement Questionnaire will be part of phase three. Monarch Pathways will be testing of participants throughout learning modules. At the completion of phase three successful testing of participants will ensure a bronze accreditation for the Friends House.

Friends House expects the certification process to take up to a year due to the certification of the entire CCRC. After the Bronze level is achieved, Friends House will seek to continue to collaborate with Monarch Pathways to attain the needed qualifications to achieve a Gold Certification within 2 years.

What other organizations will you partner with on this project?

- Center for Applied Research in Dementia, Monarch Pathways works in tandem with the Center for Applied Research in Dementia. Dr. Cameron Camp (CEO) and Vince Antenucci (COO) are both a part of the education sessions at Friends House. Also, Friends House will be asked to share the lessons learned from the program at the center's future seminars or conferences.
- Friends House has consulted another Friends community currently using Montessori practices. Friends Home in Kennett, located in Kennett Square PA is now a bronze ranked Montessori-Based Dementia facility after working with the Center of Applied Research in Dementia. Friends House will continue to engage Friends Home and seek ways to share information, lessons learned, investigate ways to share expenses and possibly lead a peer group at Leading Edge and FSA conferences.
- Montgomery County Council Grants, a longtime funding partner with Friends House and always looking for innovative work supporting seniors. Friends House will be asking for grant funding for all three phases of this program.
- Individual donors and Family Foundations, This internationally known method is very interesting to donors looking to fund innovative programs. Three of Friends House's major donors are meeting with the Director of Development
- Homes for America, works with Friends House and manages the adjoining tax credit building called Homes on Quaker Lane. While not an official arm of Friends House Retirement Community, we share a common footprint and resident base. The residents of Homes on Quaker Lane are considered part of the Friends House family.

What outcomes do you expect—what change will occur, what impact will it have?

- Provide a better aging experience for our residents.
- Create an environment where residents feel more at home, a place they do not want to seek an exit or wander away from.
- Increase the length of time a family or friend visits a resident by increasing the quality of that time. Engaging Montessori methods will increase visit times and comfort levels of the residents and friends and families. Currently, it is hard for most family members to think of more than 10 minutes of conversation when visiting a loved one. This program will offer skills to family members as well as residents and increase the comfort level of both.
- Less use of psychotropic drugs.
- Increase in staff productivity
- Become a Montessori Inspired Lifestyle organization. The first CCRC in Maryland to earn such a certification.

What outputs (measureable, specific) do you expect?

Friends House expects to track the following tangible data:

- For residents: measurable outcomes achieved through recording the number of behaviors, visits, exit seeking and drug use prior to the program beginning and after it is engaged.
 - Increased engagement and a decrease in responsive behaviors
 - Number of family visits and length of visits increase
 - Reduction of falls, and exit seeking
 - Less use of psychotropic drugs

- Increase of staff productivity and satisfaction. This measurement will be achieved with a Gallup Q12 Employee Engagement Questionnaire. The questionnaire will be used throughout the program.
- Become a Montessori Inspired Lifestyle Organization and achieve the Bronze ranking from the Center for Applied Research in Dementia.

How will you measure outputs and outcomes?

- For residents:
 - Increased engagement and decrease in responsive behaviors, and focusing on a specific task.
- For staff, an increase of engagement and productivity and decreased turnover. Employees will take a Gallup Q12 prior to the program and during the program.
- Decrease in psychotropic drugs, measured by comparing medical records prior to the program and studying the records during implementation of the program.
- Visitor feedback, family satisfaction surveys regarding staff. Gallup Q12 studies will be used throughout the program
- Being awarded a Bronze Rating from The Center for Applied Research in Dementia

How will you sustain the project after the grant period?

The Montessori skills learned over the first year of implementation will become a part of the Friends House culture. New employees will be skilled in Montessori lifestyles method as part of the onboarding process. Administration will make Montessori lifestyles part of the ongoing curriculum and culture. This training begins for staff during the job interview and orientation, reinforced by the hardwiring into the organization, and continue during the entire length of stay. It is the responsibility of senior management to manage by example. Living out Quaker Values with Montessori skills to enhance and sustain this culture.

How will your results be shared and replicated?

Friends House consulted with Friends Home in Kennett to design this program. Friends House intends to report to other Friends senior locations. FH trainers will be available to our colleagues. Also Friends House website, and Facebook, newsletter, with donors. Leading Age, FSA, and Center for Dementia Care webinars and conferences.

How does this project fit with Friends Foundation Values?

Service to Diverse populations: Our community continues to serve a diverse group of Friends. Our residents have various backgrounds, come from different countries, and vary in race and sexual preferences.

Potential to create change: The entire program is an innovative change in senior care. Friends House will be the first CCRC to gain certification in the state of Maryland.

Collaboration: Friends House has enjoyed collaborating with the Center for Applied Research in Dementia and hope to continue working with them ultimately earning a Gold certification. Friends House seeks to collaborate with other Friends organizations, Leading Age, and the Center for Applied Research in Dementia.

Engagement of employees and participants: The Montessori Program Friends House is embarking on will require the engagement of the entire staff. Staff will also be afforded the opportunity to offer feedback throughout the process of program development and implementation.

Continuing engagement of Friends Foundation for the Aging Friends House is grateful for the assistance we have received from FFA. It is our hope that the support will continue throughout the strategy to achieve silver and gold ranking. We hope to participate in conferences supported by FFA. We welcome the recommendations of future partners.

Integration of services. Friends House Management will integrate all areas of our organization into the program involving the entire Friends House family

Program Timeline

| Task | April | May | June | July | August | September | October | November | December | January | February | March |
|---|-------|-----|------|------|--------|-----------|---------|----------|----------|---------|----------|-------|
| Phase One: Data Gathering and Plan Development | | | | | | | | | | | | |
| Phase Two: Working with Staff and Preparing for Resident Involvement | | | | | | | | | | | | |
| Phase Three: Continued Working with Staff and Creating a Bronze certified Montessori Inspired Community for Residents | | | | | | | | | | | | |
| Education Meeting to share results | | | | | | | | | | | | |
| Collaborating with Monarch Pathways | | | | | | | | | | | | |
| Collaborating with Center for Applied Research in Dementia | | | | | | | | | | | | |

Budget

| Montessori Inspired Lifestyle Program | Cost Item | Cost Amount | Friends House is requesting from FFA | Friends House | Major Donor support |
|---------------------------------------|--|-----------------|--------------------------------------|-----------------|---------------------|
| Program Costs | Program costs: 3 phases of program development requires instruction over a 12 month timeframe. Instructors will meet monthly with staff from all departments and 3 shifts, to teach and coach. Questionnaires, workbooks and surveys are part of the training. Participants will review materials during in person classes and during zoom meetings. Train the trainer classes. Ongoing crisis counseling throughout the year. | \$25,300 | \$25,200 | | |
| Material Costs | Materials, include workbooks for 150 participants. Gallup Q12 polls will be conducted at the beginning and toward the end of the project. Activity guides, books, handouts in print and web based. All training and testing materials, Printed copies of Dr. Camp's books for several participants and our lending library. | \$7,900 | \$2,500 | \$2,500 | 2,900 |
| Personnel Costs | Instructor travel expenses include flights and mileage for 4 instructors. Dr. Cameron Camp, Vince Antenucci, Gary Johnson, Bryan Stevenson. | \$3,000 | \$3,000 | | |
| Staff Support and Salaries | A portion of 7 Senior staff member's salaries | \$35,000 | \$4,400 | \$15,100 | 15,500 |
| Totals | Totals | \$71,200 | \$35,100 | \$17,600 | \$18,400 |