



*Friends House Retirement Community, Inc.
2022 Grant Report
Montessori Lifestyle Program*

Summary: Friends House (FH) is pleased to report that our community is effectively working toward a Silver Level Montessori Credential in Dementia Care. Rather than concentrating efforts on a dedicated memory care unit, we aim to address cognition challenges among residents in assisted living, skilled nursing, and even independent living. FH and the Center For Applied Research In Dementia (CARD) consultants of Monarch Pathways have conducted 12 training sessions for staff at several levels as well as with residents volunteering in health care areas. Our Montessori practices continue to improve the lives of residents, who collaborate in their own care, and contribute to the management of their home environments in accord with principles of respect, dignity, and equality. We thank you again for your support.

What have we done? What worked? Friends House memory care community aspires to be person-centered, an environment where residents know their neighbors, care for each other, collaborate with caregivers in sustaining their environment, connect to families and outside communities. In the last two years we have targeted assisted living (while training staff in skilled nursing areas) and observed gratifying improvements in the lives of residents. The shadow-box/frame project has increased sociability and sharing in Haviland Hall- Assisted Living. Most residents have created unique and personal collages for the frames outside their doors, and they take pleasure in explaining their choices to acquaintances in the hallways. One resident frequently pushed herself to stand up from her wheelchair to study the family photos in her frame. Another took pride in the educational value of his display of historical philosophers. A resident who assembled images of her favorite dogs often uses her frame as an occasion to reminisce with neighbors about her lifetime of dog companions.

Montessori volunteers and trainers have often noticed that housekeeping and kitchen staff engage very positively with residents. Housekeeping and laundry staff, and Jim Lyon (director of environmental services) know residents personally and often reach out to residents with needs to make sure they can meet their own day-to-day goals. Further, in keeping with CARD consulting, Friends House recently hired a new dining services director, Jason Rosewag. He meets frequently with assisted living residents and has made significant steps toward increasing food choices and expanding menus.

All these changes testify to the Friends House commitment to being a Montessori Inspired Lifestyle Credentialed Community, the pinnacle of memory care, the careful combination of evidence and empathy distributed throughout our community.

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March 14, 2023*

What didn't work? Over the past year, however, implementing the Montessori Inspired Lifestyle (MIL) program has been challenging, with COVID-19 remaining a burdensome part of our lives. One impact of the pandemic has been an unprecedented high rate of staff turnover in nursing homes. FH has had to rely on part-time staff and agency nurses, leading to poor communication among the staff. At the same time, Montessori training cannot reach everyone who interacts with residents in this shifting population. When a staff leader departs and is replaced, training must be initiated again. Under these conditions – and now working with a relatively new and committed leadership group in nursing care – we still need to identify and educate a few Montessori Champions. With an eye on the prize of reaching Silver and moving on to Gold, we anticipate forming a staff task force led by CEO Phil Burkholder. The work of this task force will supplement the training provided by Monarch Pathways and put in place those Silver goals not yet achieved in 2022.

Measuring success in 2022

1. Staff Training: Under the staffing conditions mentioned above, trainings at all levels have sometimes had to be repeated, but CARD staff and Healthcare Center leaders have organized 8 sessions for both leading staff and frontline nursing, housekeeping, and maintenance staff.
2. Partnerships: A small committee of volunteers from independent living was formed at the beginning of the MIL program. In 2022 their efforts were supplemented by a larger committee of health care visitors committed to improving FH person-centered care. These committed visitors to assisted living and skilled nursing were frequently barred from entering health care areas under stringent County Covid regulations in 2022. But the MIL group has persisted in implementing and maintaining the shadow box program marking home doorways for residents. The “MMC” (Montessori memory care, or “mighty memories crew”) meets monthly, often 4-10 participants meet with Bryan Stevenson, of CARD, to compare notes and discuss the particular friendships and collaborations they are developing in Healthcare.
3. In the Haviland Community (assisted living), shadow box frames are becoming the public face of our diverse residents. Walking down the hall, one really gets a feel for the individuals who make up this community.
4. Though assisted living was a key focus for the Bronze Credential, we have begun to extend Montessori activities community-wide. Additional MIL activities have begun in the Stabler and Thomas Communities (Nursing and Rehabilitation). This is especially the case for staff training, but these two communities will become officially a part of the program in 2023-24.
5. In collaborations with management, assisted living residents, and food services staff, residents are increasingly making choices about dining, enrichment activities, and daily schedules.
6. Some agenda items requested by assisted living residents at the outset of the Montessori program have now been accomplished. Notably, the Haviland Hall

Solarium now has functioning heat and cooling and can serve as a beautiful retreat even for residents who are not very mobile.

7. An Action Plan for moving forward to achieve Silver and Gold Level status is under development in discussions with CARD staff.

7 Next Steps to reaching Silver and then Gold

1. Training is ongoing. As staff turnover remains high, a *Train the Trainer* program will be vital to the sustainability of the program. The healthcare job market is very competitive. Friends House has employees who have been with us for 37 years. But, the 2023 market post pandemic sees nurses, certified nursing assistants, and general nursing assistants join the team and leave within 30-60 days. It is our goal to reduce turnover of staff by adding Montessori principals to onboarding and daily routines.
2. A Montessori Inspired Living Task Force, consisting of leading staff members who are becoming trainers, is being formed to speed progress toward fuller coverage of our campus with Montessori principles. This group will meet monthly and consist of members from each department
3. Friends House management anticipates budgeting to hire a specialist with training and experience in social gerontology or related fields to devote at least half-time to advancing Montessori program goals.
4. Montessori Champions will be identified and supported to implement the requirements for Silver and Gold certification. They will develop more individualized and collaborative projects that can enrich life throughout the health care neighborhoods.
5. Resident volunteers continue to develop new projects for health care residents in response to the expressed aspirations and desires of those residents. One possibility is computer-edited “my place” books combining images and short texts chosen by residents. Another is a resident-maintained veranda herb garden in Haviland Hall.
6. With a MIL Specialist, Friends House Retirement Community will need consultants less while bringing Montessori principles “in house.” We seek to ensure that the person-centered dignity and respect fundamental to MIL becomes the way of life at Friends House.
7. Sustainability: By hiring a specialist who will devote at least half time to MIL programs, the program can become sustainable within the organization’s budget. CARD consultants will remain available to assist and inspire as needed.

Friends House thanks Friends Foundation for the Aging for its continued support. Please consider supporting our efforts as we seek Silver and Gold level credentials.

Budget

Cost Item	Cost Amount	Friends House is requesting from FFA	Actuals
<p>*Continued instruction over a 12 month timeframe. Instructors will meet monthly with staff from all departments and 3 shifts, to teach and coach. Train the trainer classes. Ongoing crisis counseling throughout the year.</p> <p>Questionnaires, workbooks and surveys are part of the training. Participants will review materials during in person classes and during zoom meetings.</p> <p>Industry Expert coaching. Internationally known members of the Center for Applied Research in Dementia will coach Friends House staff & residents</p>	\$28,500	\$25,500	\$25,088
<p>Materials, include workbooks for 150 participants. Gallup . 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.</p> <p>Materials and supplies for 102 resident rooms and common spaces. Activity supplies, room remodeling supplies, Activity Boards, Welcome Center supplies, Shadow boxes, and posters</p> <p>Infrastructure improvements requested by residents in the Montessori Resident meetings. When given the choice of what structural improvements they would like to see the unanimous decision was a HVAC system in solarium.</p>	\$8,233	\$3,877	\$ 3,000
Instructor travel expenses include flights and mileage for 4 instructors. Dr. Cameron Camp, Vince Atenucci, Gary Johnson, Bryan Stevenson.	\$3,500	\$3,000	\$3,489
A portion of staff salaries	\$38,000	\$6,400	\$7,200
	\$78,233	\$38,777	\$38,777