



*Friends House Retirement Community, Inc.
2023 Grant Application
Montessori Lifestyle Program
Gold Level Credential*

Executive Summary

Friends House Retirement Community, Inc. (Friends House) seeks to partner with Friends Foundation for the Aging (FFA) to sustain and enhance a Montessori Inspired Lifestyle (MIL) program throughout the Friends House community. We believe that this memory care initiative merges Montessori principles and Quaker values that have guided the Friends House caring community for decades. It is our goal with this grant to achieve a Gold Level Credential through the Center for Applied Research on Dementia (CARD). Friends House humbly requests a grant award of \$39,444 to assist us with this valuable program.

A Montessori Inspired Lifestyle Credentialed Community

Friends House achieved a Bronze Credential in 2022 and has been working toward Silver since then. Staff and residents are working together to create a Montessori Inspired Lifestyle Credentialed Community.

The Board of Friends House and its senior leadership are very proud of this accomplishment. We are excited to see the Montessori Inspired Lifestyle program's immediate impact on residents' engagement with decisions in their daily life currently through enhanced, personalized shadow boxes and resident led music, structure upgrades and arts programming. Staff as well are experiencing the benefits of engaging residents' ideas for improvement through appreciative inquiry, and then supporting and collaborating with residents to meet these wants and needs. Shifting the focus to resident-directed activities of daily living enables staff to coordinate services that meet or exceed resident expectations and makes caregivers happy too. "We are very happy to partner with Friends Foundation for the Aging to bring and sustain a Montessori Inspired Lifestyle (MIL) to Friends House." Philip Burkholder, CEO of Friends House Retirement Community.

Objectives for attaining a Silver Level Credential (these objectives will remain constant through Gold Level Credential)

Friends House will continue to work with the Center for Applied Research in Dementia (CARD) to achieve the next levels of Credentials. In 2023 FH will seek to meet the following objectives:

1. The creation of an Interdepartmental Task force
2. Providing more expert training for staff and extending the training to additional staff by increasing the use of an in-house process.
3. Forming new Montessori resident activist committees and helping them serve in Stabler and Thomas Nursing Home neighborhoods.

4. Adding Montessori techniques to intake procedures for new residents. This includes assessing new residents' strengths, capacities, personal history, interests, likes and dislikes and methods of calming.
5. Ensuring that a system is in place to share and update information regarding resident engagement with all appropriate staff interacting with the resident.
6. Amending employee orientation procedures to include training on Montessori Methods of working with team members and residents in coordination with enhanced Quaker value orientation.
7. Increasing resident control over community elements and the environment (e.g., maintaining libraries, posting schedules, setting up for activities and meals, etc.).
8. Continuing to personalize rooms, to include color, entry frames, personal art, and furniture.
9. An interdepartmental team will be set up to meet on a regular basis to explore causes of responsive behaviors in each resident and to determine interventions; staff members who deliver personal care as well as staff from a variety of departments such as housekeeping and dining will be included in these teams.
10. One new staff member and several Champions to be credentialed in 2023 will be supported in their Montessori work.
11. Management staff and credentialed staff will attend a workshop on the Social Life Template® (a.k.a. "Shaping a Montessori Community").
12. Quality assurance processes and measures will be put in place to ensure that key principles from trainings are being implemented appropriately

Will your efforts/actions change?

After spending 2 years working toward a Bronze and then Silver Level Credentialing, through a pandemic, and changes in clinical leadership, Friends House is committed more than ever to go the distance and become a Gold Level Credentialed facility. Acknowledging the significance of the program, Friends House plans to hire a specialist in gerontology social work (or with similar experience) to devote much of her/his effort to the Montessori Inspired Lifestyle program. He/she will be responsible for the MIL program community-wide. With their help and the focused work of the Montessori Task Force it is our next step in the process to attain a Gold Level Credential in 2024. Person to person care with employees and residents using Montessori methods is already becoming a way of life at Friends House, and we look forward to expanding the reach of Montessori principles and allied Quaker values across our campus.

How will you know if the program is successful?

- The task force will have met monthly resulting in an increased leadership engagement with Montessori programs and at least 3 credentialed Champions
- All staff trainings will engage in a process of evaluation and follow up with staff performance assessments that draw on Montessori principles.
- Intake procedures for both healthcare residents and staff, will have new protocols attentive to the MIL goals.
- For residents, an increased engagement in quality of life activism, improved ability to focus on specific tasks, and a decrease in resistant behaviors.

- For staff, an increase of engagement and productivity and decreased turnover. Employees will take a Gallup Q12 periodically during the program.
- CARD will assess the degree of improved communication and information sharing in healthcare areas
- Structural environment altered in response to the designs and plans activist residents
- 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.
- The Shaping a Montessori Community workshop will be scheduled for Friends House staff in the late fall of 2023 after some of these benchmarks have been reached.
- Being awarded a Silver Rating by The Center for Applied Research in Dementia.
- Gold rating is contingent on six months of sustained Silver criteria in place, so Friends House may be able to achieve Gold by the second quarter of 2024.

Budget

This budget reflects Friends House’s ability to sustain and continue Montessori Programs after a third year of Friends Foundation for the Aging funding.

Montessori Inspired Lifestyle Program	Cost Item	Cost Amount	Friends House is requesting from FFA	Friends House	Major Donor support
Program Costs	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.				
	Industry Expert coaching. Internationally known members of the Center for Applied Research in Dementia will coach Friends House staff & residents	\$10,000	\$5,000	\$3,500	1,500
Material Costs	Web based and print materials for teaching				
	Materials and supplies for up to 102 resident rooms and common spaces. Activity supplies, room remodeling supplies, Activity Boards, Welcome Center supplies, Shadow boxes, posters	\$15,000	\$4,444	\$7,500	3,056
	Also it is important to note that as residents change, new shadow boxes are needed. Family members love them and always ask if they can have them.				
	Meeting the silver requires working on the physical environment most of which will be absorbed by Friends House				
Personnel Costs	Specialist who's focus is the Montessori Lifestyle Program with a gerontological background	\$75,400	\$30,000	\$25,400	20,000
Totals		\$100,400	\$39,444	\$36,400	\$24,556