



## **Grant Report on grant received May 2022: \$41,800.00**

### **1. What problem were you addressing? What solution did you propose to address it?**

We sought to address the challenge of enhancing memory care resident interaction and engagement, thereby improving their quality of life. Our solution involved seeking innovative techniques to cultivate a relatable and dynamic culture for both residents and caretakers. To achieve this, we embraced a new cultural perspective and adapted our approaches within the Darlington community. Our exploration led us to discover the Montessori Inspired Lifestyle (MIL), a framework that offered personalized resident-centric living, enriched with engaging activities. Additionally, MIL provided a robust foundation for intensive training and research, all upheld with integrity. Notably, the principles of MIL harmonized seamlessly with our Quaker values, which hold great significance within our role as a Quaker home for seniors.

### **2. What actions did you take? What worked and didn't work toward your objectives? Please share any unanticipated benefits or barriers encountered.**

After conducting extensive research and determining the value of implementing a Montessori Inspired Lifestyle (MIL), our focus shifted towards finding a well-established practice that incorporated thoroughly researched Montessori methods. Our exploration led us to the Center of Applied Research for Dementia (CARD), renowned for their evidence-based approaches validated within the demographic we engage with and serve.

Overcoming initial hurdles, primarily centered around familiarizing our staff with the MIL concept in the context of Darlington, posed a challenge. Initial attempts at online training yielded limited progress, prompting a reassessment. Following the essence of MIL principles—"ask, why, and try"—we recognized the necessity to adapt training sessions to accommodate staff schedules and to explore innovative presentation formats. A collaborative effort between CARD and MIL Hickman Staff Champions (Crystal and Stacey) resulted in the decision to conduct in-person training sessions at flexible times, facilitating active engagement and effective learning among staff. This approach yielded remarkable results, fostering enthusiasm and pride in our memory care initiatives. The transformation of learning methods, incorporating "Lunch and Learn" sessions alongside in-person training, inspired an element of enjoyment eagerly anticipated by the staff.

Positive outcomes included enhanced comprehension and engagement from key staff members, instilling a deeper appreciation for the MIL philosophy. Implementation of MIL practices through trained staff profoundly impacted residents, empowering them to lead



activities, actively contribute to daily life at Darlington, and form committees to address various neighborhood-specific needs. These endeavors align seamlessly with the principles of stewardship and community. Furthermore, MIL's influence began to manifest in improved staff morale and stress reduction, as our journey of learning and integrating MIL techniques and communication strategies continues to unfold.

**3. How did you measure success--both quantitative and qualitative? What did you learn? Please include numbers and demographics of people touched by the work.**

The efforts of residents stand out prominently as they actively contribute to programming, assume stewardship roles on their respective floors, and exhibit a profound sense of pride in their community involvement. Their enthusiastic participation extends to the formation and active engagement in committees, initiated through their own ideas. Notably, the vibrant collaboration between staff and residents manifests in genuine smiles and a shared sense of accomplishment, enhancing the daily activities organically. From a quantitative standpoint, technology such as LifeLoop serves as a valuable tool. It captures, evaluates, and disseminates actual resident participation in activities, fostering engagement among staff, residents, and families alike. Activities displaying elevated levels of participation, creativity, and engagement are seamlessly integrated into daily schedules, offering accessible participation for residents and family members. A visual record, including photographs of these activities along with participant details, is meticulously documented on LifeLoop for each resident's reference.

**4. How did partnerships/collaborations enhance or challenge the project?**

Forging partnerships and fostering collaboration with fellow participants of CARD's MIL program has proven exceptionally beneficial. This engagement expedites our learning curve, enabling us to efficiently implement the program while receiving valuable insights regarding effective timeline strategies for its rollout. Our affiliations with other MIL-affiliated facilities have provided us with proven techniques and innovative perspectives for interacting with staff, thus reinforcing the MIL approach as we introduce it to our memory care unit, Darlington. These connections serve as benchmarks to assess our progress and continuously fine-tune our implementation plans for the benefit of both residents and staff. Moreover, our routine virtual meetings via platforms like Zoom with other MIL leaders and staff members provide invaluable ongoing support, offering a stage to address emerging challenges or scenarios.

**5. Include a budget and actual for the project during the reporting period.**

Attached as separate document.

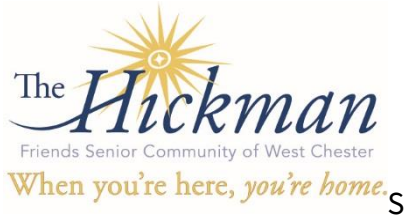


**6. What conversations have you had on how to sustain the project after the grant, and do you have plans to share your results with other organizations?**

The Leadership of the MIL® program participates regularly in joint calls with other senior communities who are implementing the MIL® program. Sharing tactics and philosophies have helped fine tune concepts and offered real life suggestions on how to materialize theoretical concepts. Meaningful dialogues have taken place involving our Executive Director and CARD, focused on establishing a framework for the lasting viability of this program. The vision is to sustain this initiative through dedicated "Champions" identified in the early stages by CARD. These Champions will persist in staff education, acquainting new members, and enlightening professional students engaged in clinical studies and internships at Darlington alongside Stacey. Their ongoing connection with CARD will be instrumental in upholding the program. Concurrently, CARD is exploring innovative avenues to fortify accountability and sustainability, including potential future programs and credentials for sites that robustly and passionately maintain the MIL philosophy. Furthermore, the staff's involvement in the program is underscored by genuine integrity and a sincere commitment to advancing the welfare of both present and future residents.

**7. Feedback on your interaction with FFA would be helpful. How have we helped? Made it harder? What else can we do to facilitate your work?**

As mentioned earlier, our engagement with FFA has been incredibly valuable. Their unwavering support, ethical approach, and genuine commitment to the MIL initiative have instilled a profound sense of responsibility. This commitment stems from a shared objective: to ensure the program's success with a strong emphasis on enhancing residents' quality of life. FFA's financial backing ensures the provision of education, training, and active participation in MIL for both staff and caretakers. While our online meetings serve as essential communication channels, I believe that convening an "in-person meeting" could impart a deeper level of motivation. This physical interaction has the potential to foster genuine relationships, enriching the program's credibility and impact. Furthermore, conducting such meetings would facilitate the establishment of clear program expectations, thus enhancing the MIL experience through authentic insights and knowledge.



## The Diversity, Equity & Inclusion (DEI) Committee Goals Grant funding provided by Willistown Friends Meeting Trust

1. The mission of the DEI committee: celebrate diversity among staff & residents by incorporating DEI into all aspects of community life.

### Our Diversity Statement

The Hickman believes that its community composed of board, staff and residents, is enriched by its diversity. Quaker values lead to a policy of inclusion, of seeking out diversity and of nondiscrimination on the basis of race, ethnicity, religion, national origin, gender, age, ability or sexual orientation.

Our commitment to diversity flows from our common Quaker identity and values. Friends believe that each human life is sacred – that there is “That of God in every person.” This conviction has led to more than three centuries of Quaker action to promote equality, respect for difference, and the dignity of all people. The Hickman is committed to making its community a part of this heritage.

2. Provide education (in-person speakers with diverse backgrounds and teaching methods) to staff and residents to effortlessly integrate DEI principles into community life.
  - a. Goal #1: host at least 3 speakers per year.
  - b. Goal #2: invite local community members to attend at least 1 speaker session and provide light refreshments to foster community relations.
  - c. Goal #3: provide at least 1 workshop session for educational participants.
3. Include education on all types of diversity in the workplace:

## ▲ TYPES OF DIVERSITY IN THE WORKPLACE ▼



4. Grow and expand the number of committee members to include additional front-line staff, residents & family members.
5. Create *sustainability* of the positive effects of the DEI committee *through consistent funding* to support education and expansion efforts so *that current and future staff & residents'* benefit.
6. Cultivate partnerships with local DEI educators, such as West Chester University faculty, for consistent opportunities for support.
7. Provide “word cloud” t-shirts to staff and/or residents which promote the ideals of DEI (example words: diversity, unity, teamwork, Quaker S.P.I.C.E.S., integrity, etc.)
8. Provide funds for celebratory events: decorations, games, refreshments, etc.
9. Provide funds for any incurred administrative expenses.
10. Measures of success:
  - a. Number of committee members increase, and members become more diversified.
  - b. At least 3 educational events and 3 celebratory events occur in a calendar year.
  - c. LTC RISE SCORE survey shows improved results in “team diversity & inclusion” category.

**Project: Escalate the Attributes of The Montessori Inspired Lifestyle® by Improving Residents’ Environment**

Model	Description		Price Each	Number	Total
Model:RIV23	Rivara Love Seat,Nail Head Detail Front, Top	59.50"W, 31.50"D, 35.50"H	\$ 1,717.78	1	\$ 1,717.78
Model:RIV11	Rivara Lounge Chair,without Nail Head	29.00"W, 31.50"D, 35.50"H	\$ 1,149.54	12	\$ 13,794.48
Model:DT1R2A1ABH	Behavioral Tamburo Drum End Table – 19.5"Dx22"H, Straight Base,Round Top	19.50"W, 19.50"D, 22.00"H	\$ 709.38	3	\$ 2,128.14
Model: BCNA211	Barcelona Love Seat, with Bolster Pillows	60.00"W, 30.50"D, 32.00"H	\$ 1,463.71	1	\$ 1,463.71
Model:RFL21A1	Raffaele Love Seat, with Button Detail, Nail Head Detail Arms &Back	54.50"W, 28.50"D, 37.00"H	\$ 2,396.54	1	\$ 2,396.54
Model: TCLO1A10	Torcello Lounge, inside back tufting, with piping, no nail head.	31.00"W, 30.00"D, 33.00"H	\$ 1,191.96	12	\$ 14,303.52
Model: TCLO2A10	Torcello Love seat, inside back tufting, with piping, no nail head.	31.00"W, 30.00"D, 33.00"H	\$ 1,677.06	1	\$ 1,677.06
Model:RFL10A1	Raffaele Lounge Chair,without Button Detail, Nail Head Detail Arms &Back	31.00"W, 28.50"D, 37.00"H	\$ 1,768.60	12	\$ 21,223.20
	Furniture Subtotal				\$ 58,704.43
	Estimated Freight				\$ 8,805.66
	Subtotal				\$ 67,510.09
	The Hickman Administrative Expenses @ 10%				Ongoi
	Total			43	\$ 67,510.09
Grant Requested from Friends Foundation for the Aging Supporting Continuance of Montessori Inspired Lifestyle®					\$ 50,000.00
	Balance from alternate funders. E.g. Scattergood Foundation				\$ 17,510.09

<b>FRIENDS FOUNDATION FOR THE AGING</b>						
<b>Montessori Inspired Lifestyle® Training</b>						
<b>Budget: 18 Month Credentialing Journey</b>						
Supervisor and staff training	\$ 28,500.00	Participation with CARD professionals				
Credentialling Assesment	\$ 7,500.00	Ongoing testing				
Strengths Assessment Kit for persons living with dementia	\$ 2,000.00	Individual assesments				
Subtotal	\$ 38,000.00					
The Hickman Administrative Expenses @ 10%	\$ 3,800.00	supplies establish and support base-line abilities				
<b>Total</b>	<b>\$ 41,800.00</b>					



## **Grant Application to Friends Foundation for the Aging**

**Fall 2023**

### **Name of Project: Escalate the Attributes of The Montessori Inspired Lifestyle® by Improving Residents' Environment**

#### **EXECUTIVE SUMMARY**

**Problem.** Furniture in memory care units should set the environment for a calm, comforting, organized environment supporting the tenets of the Montessori Inspired Lifestyle®. Its design should feature unique durable finishes, rounded corners, and bariatric sensitivity, among other clinical features that support behavioral health. The environment affects residents' tacit senses and outward behaviors.

The furniture currently in The Hickman meets the needs of the general senior living population. Yet, the residents of the secure dementia unit, the Darlington Neighborhood, require furniture that speaks to The Montessori Practitioner Certification requirements. This approach trains supervisors and staff to approach residents with a disability framework rather than a disease framework.<sup>1</sup> Care givers are taught skills that engage residents by implementing an "Ask, Why, Try" method of inclusion. Asking why a resident is responding in a certain way (or not responding), gently probing for the 'why' of a response and then offering an alternative, "let's try this," builds trust and lays a foundation for further success. For example, a resident that experiences a toileting mishap is encouraged through the event with an "Ask, Why, Try". Caregivers offer the opportunity for a resident to explain reasons for the onset

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<sup>1</sup> Center for Applied Research in Dementia. Credentialing Handbook. <https://www.cen4ard.com/live-training/>.2022



of a toileting mishap and engage in conversation. What the Darlington caregivers and supervisors are finding is that residents are reluctant to ask for toileting assistance because they don't remember who the caregivers are. The current furniture is not designed with cognitive impairment in mind and does not facilitate self-transfer. Harsh footings, sharp corners, narrow rails complicate self-transfer. By the time a dementia patient gains footing, they are already experiencing voiding or soiling. Current furnishings are hard to clean, usually requiring removal from the community, and often retain odors upon return. The resulting wear and tear on the hard goods age the items beyond their chronological years. The furniture is aging more quickly than that in the rest of the community and does NOT support The Montessori approach to reduce isolation, improve participation in activities, and increase self-reliance. The MIL® requires advancement toward these goals to reach the Gold credential. The result is a negative impact on the self-esteem of the resident and the level of trust they assign to a caregiver. Self-esteem is greatly diminished when independence falters and trust in caregivers waivers. When needs are not met, the sense of isolation increases and self-reliance wanes.<sup>2</sup>

Incontinence also has been noted to be a major barrier to social interests, entertainment, or physical recreation ([Shelton Broome, 2003](#)). Significant urinary incontinence may cause shame and lead to withdrawal from social activities. Elderly outpatients describe their experience with incontinence as embarrassing, upsetting, and distressing ([Bogner, Gallo, Swartz, & Ford, 2002](#)). Persons with urinary incontinence may be anxious about not having ready access to a toilet and may worry about the possibility of a urinary accident in public ([Ghodsbin, Kargar, Jahanbin, Sagheb, & Keshavarzi, 2012](#)).<sup>3</sup>

## **Solution**

The Darlington Neighborhood (Darlington) is credentialed at the Silver level of the The Montessori Inspired Lifestyle®. Darlington is progressing toward the Gold credential. The residents of the Darlington Neighborhood are the population to be served by the resources of this grant.

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<sup>2</sup> <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4796457/>

<sup>3</sup> <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4796457/>

Darlington residents range in age from 69 to almost 100 and are in varying stages of dementia and cognitive decline.

Advanced use of the “Ask, Why Try” method during and after toileting or behavior events has surfaced concern about the form, function, and durability of the furniture thus identifying a need for furniture that facilitates self-transfer and features designs that prevents scraps, bruises, falls and is not worn beyond its chronological age.

### **Grant Request**

The Hickman respectfully requests \$50,000.00 to continue progress and momentum toward *sustainable* Gold Certification in the Montessori Inspired Lifestyle®. Friends Foundation for the Aging’s generous grant of \$41,800.00 in 2022 funded Montessori training, credentialing, and implementation of methods within the Darlington Memory Care Neighborhood of 22 residents through Gold Status. The request for \$50,000.00 is for furniture that affects multisensory stimulation and progress toward self-determination, increased participation in activities, and reduction in isolation. The role of behavior informed furniture design is detailed in the Problem and Solution portion of this application and serves as a stimulus for MIL® sustainability.

### **Actions**

Following the cognitive ramp theory that is a baseline of MIL® practices, residents that can configure their self-management systems realize higher self-esteem, maintain independence longer and exhibit higher satisfaction in daily living.

*“Our aim is to further expand the way ‘we’ see people with dementia, shifting perspectives towards understanding and viewing people with dementia as capable consumers and inventive creators of their own self-management systems.”<sup>4</sup>*

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<sup>4</sup> <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8265518/>

Behavior informed furniture design has multisensory effects on physical activity, cognitive stimulation, and increase of social activity. Alternatively, if a resident is surrounded by others with low self-esteem, toileting shyness and fear of caregivers, he or she is more likely to exhibit similar behavior.<sup>5</sup>

## **Partners**

The Hickman's primary solicitation for this project is from Friends Foundation for the Aging (FFA). Secondary partners may include other potential Quaker funders, e.g., Scattergood Foundation.

The Hickman MIL<sup>®</sup> team is in regular contact with other Quaker senior communities participating in the Montessori Inspired Lifestyle<sup>®</sup>. One of the goals of the furniture installation is to invite other MIL<sup>®</sup> teams to a visit to experience the life-style improvements prompted by behavior-informed designed furniture. Sharing new modalities encourages the evolution of the MIL<sup>®</sup> program.

## **Impact**

Training and implementation allow the care team to speak to the dignity of whole resident, integrate the family in meaningful ways, reduce chemical interventions, ease agitation, improve employee engagement and retention, and avoid responsive behaviors. The decline in agitation, toileting accidents, and increase in trust of caregivers measures the impact of these furniture tools.

## **History**

The Hickman was founded in 1891 and continues its mission of providing affordable care to seniors of modest means.

Two women of the West Chester Quaker Community identified the need for housing among the population of widowed, senior women and began raising funds to rent, then build, a home of safety and security. Early benefactors provided endowment funds in addition to building funds that set the path for a future of service to those of modest means. It was not long until men and couples joined the 'family'.

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<sup>5</sup> <https://medium.com/authority-magazine>

The Hickman is a senior living community in the heart of West Chester, Chester County, Pennsylvania. The Hickman provides individualized care and assistance to older adults who seek a safe and affordable living environment. The Hickman is committed to diversity. Quaker values lead to a policy of inclusion, seeking diversity, and nondiscrimination on the basis of race, ethnicity, religion, national origin, gender, age, ability, or sexual orientation. Friends believe that there is "That of God in every person." This conviction shaped over three hundred years of action towards equality, respect for difference, and the dignity of all people at every age.

The Hickman is uniquely poised to execute The Montessori Inspired Lifestyle®. The Executive Director (ED) offers certifications in Aging Services Leadership and Activity Leadership.

**Leadership for the project: Escalate the Attributes of The Montessori Inspired Lifestyle® by Improving Residents' Environment**

Toni Kelly is a Licensed Practical Nurse (LPN), Personal Care Home Administrator (PCHA), Certified Professional in Aging Services Risk Management (CPASRM), Certified Dementia Practitioner and Trainer (CDP) who has served the geriatric population for more than 30 years. Stacey Farrell is a board certified and state licensed Occupational Therapy Assistant (COTA/I) and is co-manager of the Darlington MIL® program. Crystal Jones is a Personal Care Home Administrator and a Certified Medical Reimbursement Specialist and leads MIL® along with Stacey Farrell.

The Hickman's unique qualifications include its 130-year history of serving senior adults. Since 1891, professionals have collaborated to offer state-of-the-art personal care, therapies, and housing. Our professionals discovered the Montessori Program as part of ongoing research into cutting edge modalities to assist our residents. The goal is and has been to support and treasure everyone's potential for a long and productive life.

District  
Director

P.O. Box 12836, Philadelphia, Pa. 19106

▷ Friends Boarding of Concord  
Quarterly Meeting  
400 N. Walnut Street  
West Chester, PA 19013

Person to Contact:  
Mrs. S. Pratt  
Telephone Number:  
(215) 597-4168  
Refer Reply to:

Date:

DEC 3 / 1980

Dear Applicant:

This refers to your recent telephone request for a statement saying your organization is not a private foundation.

Based on the information you submitted, we have determined that you are not a private foundation within the meaning of Section 509(a) of the Internal Revenue Code, because you are an organization of the type described in Section 509(a)(2). Your exempt status under Sec. 501(c)(3) of the code is still in effect.

Grantors and contributors may rely on this determination until the Internal Revenue Service publishes notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of Sec. 509(a)(2) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a Sec. 509(a)(2) organization.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

James T. Rideoutte  
District Director

JAMES T. RIDEOUTTE

DATE - DEC. 3 1980

REC'D DEC. 10 1980