











**Center for Applied
Research in Dementia**
Creating effective memory interventionsSM

Montessori Inspired Lifestyle[®]
Montessori-Based Dementia Programming[™]
Cameron J. Camp, Ph.D.

North and Central Florida Geriatrics Workforce Enhancement Partnership (NCF-GWEP).
Funded by the Health Resources and Services Administration (HRSA)_ 2019.

Application Requirements:

-  Memorandum of Understanding
-  Quality Measure_MIPS: List of High-Risk Medications; Psychotropic Medication Use
-  Quality Measure: 4 M's: Medication, Mentation, Mobility and What Matters Most
-  Quality Measure: Fall Risk and Incident Reports
-  Staff Turnover Rates and Staff Satisfaction Report
-  Occupancy Rates, Length of Resident Stay, and Resident Retention Rates Report
-  Care Satisfaction Ratings from Residents and Families
-  CQI: Staff Readiness to Change Survey (provide one time only at baseline)



Agreement to Participate in HRSA Training Grant
Florida State University College of Medicine
Department of Geriatrics

Your organization is invited to apply for participation in a grant program being funded by the Health Resources and Services Administration (HRSA), awarded to the Florida State University (FSU) College of Medicine, Department of Geriatrics. Paul Katz, MD and Lisa Granville, MD are the Principal Investigators of the program, which includes five unique projects that focus on interprofessional workforce trainings aimed at addressing unmet health needs of older adults at the individual, community, and populations levels. In this project, each year we are seeking two memory care neighborhoods in Central or Northern Florida to take part. This project is being conducted in conjunction with the Center for Applied Research in Dementia (CARD), led by Cameron Camp, PhD.

The goals of this project are to train staff members from at least two assisted living facilities in Florida per year in the Montessori Inspired Lifestyle® approach and evaluate its effect on staff, families, and resident behaviors. This project involves making a commitment to participate for the duration of the grant, currently ending in June 2024. In the first year of participation, staff will be trained in the implementation of the Montessori Inspired Lifestyle®, and the effects of implementing this training will be assessed through interviews with staff and residents, as well as by taking observations and collecting data from measures you currently are taking. After that, you will be asked to continue supplying these measures you are currently taking on a yearly basis until the grant is completed. The overall objectives of the project are to document the effects of implementation of the Montessori Inspired Lifestyle® on outcomes relevant to the Senior Living/Memory Care Industry, to document challenges to culture change and ways of overcoming it in this process, and to determine the capacity of Memory Care staff members to deliver training to family members and community agencies such as first responder organizations.

Training for the Montessori Inspired Lifestyle® approach will be provided by trained and credentialed staff at the Center for Applied Research in Dementia. Quality Assurance measures will be used to document that key elements and principles of this training are being implemented. Internal memory care neighborhood staff trainers / Montessori mentors will be recruited and trained to ensure implementation and maintenance of the training.



Step 1: Application to Take Part in the Project

This is a two-step process. First, organizations applying to take part in the HRSA funded project are asked to demonstrate the capacity and willingness to provide data necessary for the project to reach its goals.

Applicants therefore will provide a de-identified, summarized sample set of systems data for the previous six months on items for the memory care neighborhood applicant involving:

- 4 M's: Medication, Mentation, Mobility and What Matters Most data
- psychotropic medication usage
- number of incident reports
- staff turnover; number of falls
- occupancy rates for each of the last six months
- satisfaction survey data available for residents, staff, and family members

Applicant organizations will also provide at baseline only a campus-wide set of data on the CQI: Readiness to Change measure as part of the application for participation in the project.

All data provided in the application process will be kept confidential and will not be used for any purpose other than making decisions regarding the capacity and willingness to provide data for the project.

Step 2. Memorandum of Understanding

In addition to the data sets described above, the appropriate signing officer for the organization applying to take part in the project will provide a signed Memorandum of Understanding (MOU) agreeing to do the following to support the project:

- Continue to provide internal data sets matching those provided in the application process 6 months post MIL® training and then annually for grant duration.
- Designate a specific person to be liaison between your organization and CARD _FSU project teams. The liaison will assist grant project personnel, coordinate gathering of internal data, assist with scheduling, etc. An alternate person will be designated to serve as liaison if the originally appointed liaison is not available.
- Work with CARD and FSU to identify organizational needs and goals for participating in a training and organizational change initiative. The organization and CARD and FSU project team will periodically revisit needs and goals to identify progress and opportunities for improvement.
- Host Montessori Inspired Lifestyle® trainings, designate internal Montessori mentors who will serve as internal trainers to sustain the effects of training, and support the implementation of this approach. Participation in the project includes enforcing organizational and staff procedures and policies, such as increases in activities that support resident engagement, staff application of



Montessori Inspired Lifestyle® approaches, and environmental supports that increase resident autonomy.

- Facilitate observational data gathering of staff implementation of training and resident engagement throughout the course of the project. Track progress following Montessori Inspired Lifestyle® training and identify opportunities for improvement.
- Provide Montessori dementia training to family members and first responders or other sectors in the community. In addition, if applicable, work with local dementia-caring community task forces.
- Follow all steps necessary to become a [Montessori Inspired Lifestyle®](#) credentialed community as outlined in the following document.
- It is expected that after the first six months of participation in the project, the memory care community would receive bronze level credential, and will advance to silver or gold level credential status at the end of 12 months of participation.

After a memory care neighborhood has been enrolled into the project, data gathered from participating organizations, including data submitted as part of the application process, will be analyzed, and may be reported in educational/scientific presentations and publications. This includes information developed involving best practices for implementing and sustaining training provided for the Montessori Inspired Lifestyle®.

The HRSA funded grant requires that information from projects be made available to the public; key findings from projects are disseminated to inform best practices in dementia care nationwide. The identity of the participating organizations and memory care neighborhoods will be kept confidential in public presentations and publications. Participating organizations have the option of using their individual data for presentations, marketing, and other purposes.

Organizations applying to take part in the project are to provide this Memorandum of Understanding (MOU) to Dr. Lisa Granville, the Principal Investigator of the HRSA grant. If you have any questions about the project or application process, need more information, or wish to speak with project staff, please contact Tiffaney Holcomb at (850) 644-3827 or Tiffaney.Holcomb@med.fsu.edu



Montessori Inspired Lifestyle® Tiered Residence Credentialing

Objective: To create a tiered residence credential process to recognize initial training and milestones in Montessori Inspired Lifestyle® residence implementation.

Tier 1—Bronze Level Credential

A residence may qualify for a Bronze Level Credential after a Montessori Inspired Lifestyle®: Montessori Based Dementia Programming® two-day (12 contact hour) training provided by the Center for Applied Research in Dementia (CARD) is attended by a group of staff representing all departments, including nursing, culinary, activities, maintenance, housekeeping, marketing and administration. All attendees must pass (80% correct) an online quiz or a paper and pencil version of the quiz demonstrating knowledge of key principles. Attendees may take the quiz up to three times. There is no charge for this quiz.

In addition, there should be the following elements put into place and documented within six months of the initial two-day training:

- A minimum of two Montessori champions per 20 residents who have achieved the Montessori Inspired Lifestyle® (MIL) Trainer Credential. This trainer credential involves a demonstration of the ability to apply knowledge and principles presented in MIL training to specific cases involving residents. To qualify for a trainer credential, the applicant must complete a written case study exam describing successful MIL interventions developed for residents. These exams are evaluated and scored by CARD staff. Submitted exams may be accepted as presented, accepted provisionally with revisions, or rejected with feedback. In the latter case, the applicant may reapply for a second evaluation.

Upon receiving a MIL Trainer Credential, the staff member is provided materials and assistance by CARD staff to develop in-house training for their employing company or organization. It is important to note that a MIL Trainer Credential is only valid within the company or organization which has paid for the staff member's MIL training and credentialing. The cost of this application is \$100.00 to be paid by the staff member's employer.



Tier 1—Bronze Level Credential (con't)

- Name tags in use – staff and residents, with a system in place to ensure that these are available and used daily.
- A residents' volunteer opportunities board is in place, with residents choosing community service activities daily.
- Signage – Montessori Principles / Principle of the Week and Montessori Pledge displayed and seen by Staff and Visitors.
- Internal Training on MIL has been created and is used for staff orientation.
- At least 2 resident committees operating on an ongoing basis.
- Montessori Huddles held at least on a weekly basis, with plans for making this a daily occurrence.
- A Social Event has been planned for and conducted by the memory care residents, with Social Events to be conducted at least a twice-a-year.
- A Visitors' Center has been created and is functioning.
- Multidiscipline meetings are held on a regular basis to discuss Responsive Behaviors, along with follow-up to determine effects of interventions discussed and implemented. Staff members who deliver personal care as well as staff from a variety of departments such as housekeeping, and dining are included in these teams.
- Residents are being given choice in dining, activities, and daily schedules.
- An Action Plan for moving forward to achieve Silver Level status has been developed, which has been approved by CARD staff.



Tier 2—Silver Level Credential

A residence may attain a Silver Level Credential after achieving Bronze Level credentialing. In addition, there should be the following elements put into place and documented before applying for the Silver Level Credential:

- Applicant has a Mission Statement and Values Statement that specifically mentions respect, dignity, and equality as core values.
- Mission Statement and Values Statement state that promoting independence and membership in a community is the key goal (“Everything you do for me you take away from me.” – Maria Montessori).
- Mission Statement states that all staff members will be trained to implement these values in all interactions with residents, clients, family members, and all other staff members.
- Ongoing training/in-servicing of newly hire staff by MIL Trainer Credentialed staff.
- Ongoing refresher training/in-servicing of staff.
- At least 50% of the Gold Level Credential criteria (checklist attached) must be achieved, and an action plan must be in place for achieving the remainder of these criteria.
- Silver Level Credentialing requires a site visit by CARD staff. Cost of the Site Visit is \$2500 per day plus travel expenses. Site Visits usually take place over the course of one to two days.
- Intake procedures include assessments of residents’ strengths, capacities, personal history, interests, likes and dislikes, and methods of calming.
- Information regarding engaging the resident effectively is readily available for all staff interacting with the resident, and a system is in place to update that information.
- Personalization of rooms, doorways to rooms, furniture in rooms, window boxes, photos, color of walls, etc. enable residents to determine these key features.
- Residents have significant input in the use and naming of environmental features. This includes use and composition of gardens, selection and timing of music played, and names of common areas.



Tier 2—Silver Level Credential (con't)

- Residents largely control and maintain community elements and the environment (e.g., maintaining libraries, posted schedules, setting up for activities and meals, etc.).
- Staff members are evaluated on the basis of what they enable residents to do for themselves
- A self-assessment of the facility has been completed and submitted (Forms provided).

Tier 3—Gold Level Credential

A residence may achieve a Gold Level Credential after a minimum of 6 months of Silver Level Credentialing. To qualify, a residence must have a group of staff representing all departments, including nursing, culinary, activities, maintenance, housekeeping, marketing and administration attending an advanced course on Montessori Inspired Lifestyle®: Shaping a Montessori Community. In addition:

- At least 90% of the Gold Level Credential criteria must be achieved.
- An action plan must be in place for achieving unmet criteria, as well as sustaining and expanding MIL programming.
- At least one exemplary and innovative achievement in applying MIL principles must be demonstrated. Gold Level Credential receipt requires a site visit by CARD staff.