The QAPI Self-Assessment Tool provides great insights on how to utilize the Eden Alternative Principles and the Path to Mastery Milestones to drive quality improvement in your organization. Changing the culture of care is a quality improvement project! Time is too precious and resources too limited to separate the culture change journey from quality improvement efforts. As your team works through the QAPI Self-Assessment Tool, use the information below to make the connection between your Eden Alternative journey and meeting QAPI expectations. For each step in the QAPI Self-Assessment Tool ideas on how to reframe the statements and identify Eden Alternative resources, and steps in the Path to Mastery, that can strengthen your organization’s quality assurance, performance improvement efforts are listed below. For the Path to Mastery Milestone steps, it may be helpful to have the Resource Guide for the Milestone at hand for additional information.

Our organization has developed principles guiding how QAPI will be incorporated into our culture and built into how we do our work. For example, we can say that QAPI is a method for approaching decision making and problem solving rather than considered as a separate program.

- Replace “QAPI” in each sentence with “The Eden Alternative” or “the Path to Mastery” and you will have the guiding statement that explains how important it is to integrate the Principles and Milestone steps deeply into organizational systems and decision-making processes. To be successful and sustain the culture change journey, the Eden Alternative and Path to Mastery need to be the way you do your work, not separate “programs” that are grown when time allows.
- This integration is written into the Path to Mastery in the following steps. If you are successful in these Milestone steps, your organization will have the skills needed to be successful in meeting QAPI expectations.
  - Formal and informal leaders responsible for the mission and vision of the organization have been educated on the Ten Principles of the Eden Alternative. (M1P3)
  - The leadership team has begun to dream and develop a written plan about how to implement the Eden Alternative Philosophy and integrate the Principles into the fabric of the organization. (M1O1)
  - We use the Path to Mastery, Principles, Warmth and Well-Being Surveys as a continuous improvement process. (M2O23)
  - We are integrating the implementation of the Path to Mastery Milestone accomplishments into the long-range strategic plan for our organization. (M2O24)
  - We use the Path to Mastery, Principles, Warmth and Well-Being Surveys as a continuous improvement process. (M3O33)
  - We use the Path to Mastery, Principles, Warmth and Well-Being Assessment as a continuous improvement process. (M4O7)
  - The Principles and Philosophy of The Eden Alternative are integrated into all aspects of the Registry Member organization. (M4O9)
Our organization has identified how all service lines and departments will utilize and be engaged in QAPI to plan and do their work. For example, we can say that all service lines and departments use data to make decisions and drive improvements, and use measurement to determine if improvement efforts were successful.

- Replace “QAPI” with “using the Eden Alternative Principles” or “using the Path to Mastery Milestone steps” and you again have the guiding statement as to why all areas of service provided by the organization have to be equally committed and engaged in implementing culture change. In the second sentence, add “… use data, the Principles, and Milestone steps to make decisions and drive improvements …” This statement becomes a powerful statement of commitment across the organization when you make it specific to your culture change approach.

- Here are the Path to Mastery steps that support the need for all to be engaged in culture change improvement efforts:
  - Formal and informal leaders responsible for the mission and vision of the organization have been educated on the Ten Principles of the Eden Alternative. (M1P3)
  - The leadership team has begun to dream and develop a written plan about how to implement the Eden Alternative Philosophy and integrate the Principles into the fabric of the organization. (M1O1)
  - Formal leaders are growing as individuals and as a team on the path to becoming better leaders and can demonstrate how to balance management and leadership skills to effectively grow the Caring Community. (M2P11)
  - Formal leaders are role models of the values and mission of our home and the Principles of the Eden Alternative. They provide feedback to each other on ways to grow in this role. (M2O3)
  - Language is being transformed from institution to home and, along with the Eden Principles, is being inserted into job descriptions, policies and procedures, signage or lack of signage, educational programs, and in the spoken and written words. (M2O11)
  - We set goals and celebrate accomplishments in the Eden journey for the whole organization, teams and individuals. (M2O18)
  - Leaders in the home have shared the Eden Alternative with organizations in the extended community. (M2O21)
  - We use the Path to Mastery, Principles, Warmth and Well-Being Surveys as a continuous improvement process. (M2O23)
  - We are integrating the implementation of the Path to Mastery Milestone accomplishments into the long-range strategic plan for our organization. (M2O24)
  - Formal and informal leaders have attended the two-day Eden leadership workshop. (M3P3)
  - Formal leaders are beginning to mentor and grow other leaders in the home. (M3P8)
  - Leaders (formal and informal) care for each other as they wish the Elders to be cared for by shifting from a directive management style to a servant leadership style empowering individuals and teams. (M3P9)
  - Leaders understand that empowerment is a function of their role and they actively practice it daily. (M3P10)
  - The organizational chart reflects the changing role of mid-level managers and supervisors. (M3P12)
All clinical professionals (e.g. nurses and therapists) are redefining their roles to serve as equal partners on the team and focus on personal and Elder growth and care partner empowerment through their clinical expertise. (M3P13)

Formal leadership support to enable regular attendance at scheduled team meetings. (M3O2g)

Therapists identify ways to eliminate loneliness, helplessness, and boredom in the Elder’s lives, and improve their well-being. They are finding ways to utilize their unique skills to enable those Elders who desire to be active participants in the care of the Human Habitat. (M3O22)

There is an ongoing evaluation by leaders to assure that the new language we are using and the Eden Principles continue to be more deeply integrated into policies, procedures and everyday life. (M3O25)

Care partners are receiving education in human resource skills and are involved in the hiring, interviewing, and welcoming of new team members, managing their individual responsibilities and growing their skills and competencies. (M3O26)

The traditional hierarchy has flattened and artificial boundaries are diminished between departments, shifts, formal leaders and care partners. (M3O30)

We use the Path to Mastery, Principles, Warmth and Well-Being Surveys as a continuous improvement process. (M3O33)

The performance appraisal process holds everyone accountable to living the Eden Alternative Ten Principles. (M4P1)

The Caring Community is promoting and sustaining the well-being of all. (M4O1)

The neighborhood/household teams have developed blended roles (including traditional management tasks) through cross-training. The strengths and preferences of individual team members are identified and incorporated into the new roles. (M4O3)

We use the Path to Mastery, Principles, Warmth and Well-Being Assessment as a continuous improvement process. (M4O7)

The Principles and Philosophy of The Eden Alternative are integrated into all aspects of the Registry Member Organization. (M4O9)

Therapists have transformed their role into a “habilitator,” bringing forth the existing potential within all Elders. (M4O23)

Our organization has developed a written QAPI plan that contains the steps that the organization takes to identify, implement and sustain continuous improvements in all departments; and is revised on an ongoing basis. For example, a written plan that is done purely for compliance and not referenced would not meet the intent of a QAPI plan.

- In the first sentence, insert the following, “... a written QAPI plan to achieve the Path to Mastery Milestone steps that contains the steps that the organization takes ...” The steps within each of the Path to Mastery Milestones can be used to create performance improvement projects (PIPs) that meet QAPI standards. The Eden Alternative has created some examples that organizations can use to build their own unique improvement plans.

- In the GROWTH Model, this QAPI statement fits in the “W = Work Up a Plan” step. The plan is implemented in the “T = Take Action” portion of the model. The revision and continuous improvement portion of the plan happens under “H = Hold Steady and Reach Further.”
• Each Path to Mastery Milestone has an assessment tool where the leadership team can mark whether each step is mastered (or Completed), something they are currently working on (In Process) or something they will be prioritizing to implement in the future (Next Step). As the plan of action for each step is developed and implemented, the story is captured in the assessment tool, under each step. Both successes and challenges should be captured so that future leaders can learn from the story and continue to strengthen each Milestone step.

• Developing mastery involves continuing to grow in skills previously learned. A master musician is always practicing their scales. A master chef continues to use basic cooking skills as they take on each new recipe challenge. The same is true for the Path to Mastery. Each Milestone, though mastered, needs to be regularly reviewed and updated in order to keep the foundation strong so that further progress can be achieved on the culture change journey. The Path to Mastery Milestones are continuous quality improvement tools.

• Each Eden Registry Member receives a tree plaque that has 10 spaces that can be used to recognize and celebrate as each of the Ten Principles is implemented. Registry Members are advised that once they have filled all ten spaces, the symbols should be set aside and new ones earned. The intention is that as each Registry Members deepens their journey, the tree plaque becomes a way for them to acknowledge ongoing growth and expertise. It is a continuous quality improvement tool! This is written into the Path to Mastery Milestone 3: The Eden tree is used by the whole community to celebrate milestones on the journey. As the organization structure moves to empowered neighborhood, household or care partner teams, there are smaller tree plaques available for each team to mark off their progress with the Ten Principles. That makes it a continuous growth tool for teams as well as the whole organization.

Our board of directors and trustees (if applicable) are engaged in and supportive of the performance improvement work being done in our organization. For example, it would be evident from meeting minutes of the board or other leadership meetings that they are informed of what is being learned from the data, and they provide input on what initiatives should be considered. Other examples would be having leadership (board or executive leadership) representation on performance improvement projects or teams, and providing resources to support QAPI.

• In the second sentence, add the wording, “… what is being learned from the data, the integration of the Ten Principles and the accomplishment of Path to Mastery Milestone steps, and they provide input on what initiatives should be considered.”

• The Path to Mastery reinforces the importance of ongoing support from the governing body for the organization whether that is a Board of Directors, a corporation or other owners.
  o The Governing Board has been introduced to The Eden Alternative to secure its support for its implementation. (M1P4)
  o The formal leadership within the home has the autonomy to lead the day-to-day implementation of the Eden Alternative. (M2P12)
  o The Governing Board is actively involved in providing resources and removing barriers to the implementation of The Eden Alternative. (M4P2)

• There are resources in the Path to Mastery Milestone Toolkits to help guide the governing body and the organization’s leaders in building this supportive relationship.
QAPI is considered a priority in our organization. For example, there is a process for covering caregivers who are asked to spend time on improvement teams.

- Replace “QAPI” with “The Eden Alternative” or “The Path to Mastery” and you have a guiding statement about why organizational system change needs to happen so that full engagement of employee care partners can happen. Engaging employees in project teams is important to assure that ownership for driving the culture change journey. Leaders need to assure that interested employees have the opportunity to participate through work coverage and paid time if possible. You can also add to the end of the statement the phrase “... or participate in educational opportunities.” Education is the antidote to fear and resistance. Education provides four of the five conditions of empowerment: information, knowledge, skills/training and resources. It is a key component in driving change that is often the first thing to be cut back when times are tough. Ongoing commitment by leaders to assure care partners can participate in meaningful educational experiences is important. The critical piece is changing organizational systems and processes, and individual expectations, so that information gained through education is actually internalized and put into action by those attending. That is the fifth empowerment condition: supportive environment. Successful education helps individuals, and the organization, to grow and makes a positive impact on the lives of the Elder care partners.

- The Path to Mastery reinforces the importance of ongoing education plans and resource utilization throughout the journey.
  - Formal leaders recognize the value of education by developing a plan and providing needed resources for ongoing education throughout the journey. (M1P1)
  - Formal and informal leaders responsible for the mission and vision of the organization have been educated on the Ten Principles of the Eden Alternative. (M1P3)
  - The Governing Board has been introduced to The Eden Alternative to secure its support for its implementation. (M1P4)
  - Leaders have taken steps to educate themselves on different leadership styles. (M1P6)
  - A core leadership team representing different parts of the organization, or different aspects of daily life, has been formed, educated, and is meeting regularly to guide the implementation of The Eden Alternative. (M1O5)
  - Leadership (formal and informal) recognizes the value of education. (M2P1)
  - All formal leaders and at least one hands-on care partner per neighborhood/household are Certified Eden Associates. (M2P2)
  - All care partners have received at least 4 hours of Eden Alternative overview training covering basic knowledge of the Eden Principles as a first step in opening people’s hearts. (M2P3)
  - Families, Elders, volunteers and others are provided information on the Eden Alternative Principles and Philosophy at least quarterly. (M2P4)
  - Nurses, doctors, pharmacists and other healthcare providers (e.g. physical and occupational therapists, advanced practice nurses) have been given education in the Principles and Philosophy of the Eden Alternative and are a part of the implementation process. (M2P5)
  - Education on alternative approaches to bathing is provided to care partners. (M2P6)
  - Members of the Eden core leadership team, and others, actively participate in growth opportunities offered by the Eden Alternative organization including conference calls, education events, or International Eden conferences at least quarterly. (M2P7)
Certified Eden Associates now account for 20% of our care partners. (M3P1)

At least one family member and an Elder (to the best of their ability) have become Certified Eden Associates. (M3P2)

Formal and informal leaders have attended the two-day Eden leadership workshop. (M3P3)

All active care partners attend at least 4 hours of planned educational updates annually on the Eden Alternative progress within the Registered Home, including national Eden updates, with care partners and Elders becoming the teachers. (M3P4)

Leaders understand that empowerment is a function of their role and they actively practice it daily. (M3P10)

Everyone belongs to a neighborhood/household team. (M3O1)

Formal leadership support to enable regular attendance at scheduled team meetings. (M3O2g)

The organization is learning, growing, and teaching others about The Eden Alternative and culture change ideas. (M4O4)

We use the Path to Mastery, Principles, Warmth and Well-Being Assessments as a continuous improvement process. (M4O7)

- Milestone 3 in the Path to Mastery is about moving decision-making closer to the Elders. To support this shift in authority and accountability, the Neighborhood Guide Training provides managers and leaders with the tools and curriculum needed to teach quality improvement skills to all employees.

- The GROWTH Model provides a structured conversation for change and improvement. It is easily learned by all members of the care partner team. The GROWTH conversation builds the case for change, sets a vision and SMART goals, develops an action plan and assures that plans are in place to make the change “stick.”

**QAPI is an integral component of new caregiver orientation and training. For example, new caregivers understand and can describe their role in identifying opportunities for improvement. Another example is that new caregivers expect that they will be active participants on improvement teams.**

- Replace “QAPI” with “The Eden Alternative” and you have the guiding statement about how important teaching the Principles and philosophy is for those who are new to the organization. This education should be more than a 10-15 minute review of the Ten Principles. New employee welcoming should include a depth of education that demonstrates how they can become an integral part of assuring that daily support of the Elder care partners will align with the Principles, philosophy, mission and vision of the organization’s culture change journey. This initial education should also provide them with the skills they need to build self-awareness of the institutional trappings that can derail the culture change journey so they can actively participate in ongoing change efforts.

- The Path to Mastery includes steps in Milestone 3 where new employee and Elder care partners are welcomed and woven into the fabric of the organization.
  - New members of the community are welcomed by the neighborhood/household teams and brought into the social fabric of the community. (M3O7)
Training is available to all caregivers on performance improvement strategies and tools.

- Quality improvement tools and strategies are included in several Eden Alternative educational offerings:
  - Certified Eden Associate Training
  - Eden at Home Associate Training
  - Leadership Pathways to Culture Change
  - GROWTH: Six Steps to Implementing Change
  - Neighborhood Guide Training
  - Dementia Beyond Drugs

- Specific Eden Alternative tools that can be applied to performance improvement efforts include:
  - Decision Rings
  - Three Types of Transformation
  - Three Stages of Eden
  - Eden Alternative Warmth Surveys
  - Eden Alternative Well-Being Assessments
  - The Path to Mastery Milestone Assessment Tools
  - The GROWTH Model

When conducting performance improvement projects, we make a small change and measure the effect of that change before implementing more broadly. An example of a small change is pilot testing and measuring with one nurse, one resident, on one day, or one unit, and then expanding the testing based on the results.

- During the Certified Eden Associate Training, the Three Stages of Eden are taught. The stages are: Vision, Education and Implementation. In the Implementation stage, the first item discussed is the importance of starting with small changes that are pilot tested and evaluated before moving forward from there.
- In the GROWTH Training, organizational change readiness is discussed and assessed by the attendees. The idea of starting small, and in the place of greatest opportunity, is reinforced through the readiness assessment.

When addressing performance improvement opportunities, our organization focuses on making changes to systems and processes rather than focusing on addressing individual behaviors. For example, we avoid assuming that education or training of an individual is the problem, instead, we focus on what was going on at the time that allowed a problem to occur and look for opportunities to change the process in order to minimize the chance of the problem recurring.

- The Eden Alternative believes that personal, organizational and physical transformation all work together to make culture change successful. The most important is personal transformation because the culture of the organization grows out of the beliefs, values, attitudes and assumptions of the individuals who are a part of it. Culture drives the actions of the employee care partners including actions that can lead to improvements as well as errors. Education is one way to foster personal transformation but it will not “stick” and make a difference unless organizational transformation happens in alignment with education. It is the integration of organizational system change, along with education and skills building, that leads to sustainable
performance improvement. Physical transformation must be designed to create home. When home is expressed in what people see around them, they are more likely to transform organizational systems to sustain the experience of home and act in a manner that makes everyone who encounters it feel at home. Visitors are often heard saying that long-term care organizations engaged in culture change “feel” different when you walk in the door. That is due to the warmth created through caring relationships fostered by personal, organizational and physical transformations that are aligned.

- The Dementia Beyond Drugs Training provides tools to shift thinking away from the behaviors of Elders living with dementia, focusing instead on an environmental audit. The outcome is to see behaviors as unmet needs and assess what is happening in the environment that could be driving the Elder’s actions. These same skills can be used for all care situations, not just for those Elders living with dementia.

Our organization has established a culture in which caregivers are held accountable for their performance, but not punished for errors and do not fear retaliation for reporting quality concerns. For example, we have a process in place to distinguish between unintentional errors and intentional reckless behavior and only the latter is addressed through disciplinary actions.

- In the Neighborhood Guide Training, the Guides are taught about the concept of a Just Culture and how to apply that in their role of growing empowered teams.
- Through implementation of the Neighborhood Guide modules, empowered teams develop their own code of ethics, team growth plans and a disciplinary process that they create and sustain. The role of the Neighborhood Guide is to instruct the team in the concept of a Just Culture as they take on the authority and accountability to support and grow each other.
- The Paradigm Buster, The Role of Job Descriptions and Performance Evaluations in Person-Directed Care, shifts away from performance evaluations into growth plans. The supervisor takes on the role of a growth partner. This shift to a focus on growth, rather than evaluating performance, is designed to bring forth strengths and opportunities to improve systems and processes that help the individual be their best.
- The Path to Mastery includes steps that move accountability into teams so that peer-to-peer accountable grows through genuine human caring, not punishment or retribution.
  - Formal leaders care for the care partners as they wish the care partners to care for the Elders by shifting from a directive management style to a servant leadership style, empowering individuals and teams to manage or take larger roles in making decisions affecting the daily life in the home. (M2P10)
  - Formal leaders are growing as individuals and as a team on the path to becoming better leaders and can demonstrate how to balance management and leadership skills to effectively grow the Caring Community. (M2P11)
  - Efforts have been made to equip care partners in conflict resolution skills, and conflict mediators are available all day, every day. The organization is working to create an environment where conflicts are resolved. (M2P13)
  - Elders, families and care partners are working together to create a Caring Community. (M2O5)
  - Leaders understand that empowerment is a function of their role and they actively practice it daily. (M3P10)
Team members are taking responsibility for their own actions, apologizing for mistakes, ‘saving face’ for others, and encouraging one another to stay on the journey despite frost and set-backs. (M3P14)

Team members have skills in team tools; for example meeting process, problem-solving, team leadership model, communication, conflict resolution and leadership. (M3O2c)

Neighborhood/household teams have the capability and authority to resolve their own conflicts. (M3O3)

Care partners are receiving education in human resource skills and are involved in the hiring, interviewing, and welcoming of new team members, managing their individual responsibilities and growing their skills and competencies. (M3O26)

The performance appraisal process holds everyone accountable to living the Eden Alternative Ten Principles. (M4P1)

The Caring Community is promoting and sustaining the well-being of all. (M4O1)

The neighborhood/household team has strong caring relationships and care partners are accountable to each other. (M4O15)

Elders are involved in interviewing, hiring, mentoring, evaluating and disciplining employee care partners. (M4O17)

We see care as helping another to grow, and it is a core value on our journey, not another task to be completed. (M4O25)

Leadership can clearly describe, to someone unfamiliar with the organization, our approach to QAPI and give accurate and up-to-date examples of how the facility is using QAPI to improve quality and safety of resident care. For example, the administrator can clearly describe the current performance improvement initiatives, or projects, and how the work is guided by caregivers involved in the topic as well as input from residents and families.

- Replace “QAPI” with “The Eden Alternative” or “the Path to Mastery” and you have a guiding statement about how important it is for all leaders to be well versed in the Principle and philosophy that drives care in the organization. Every leader should be able to cite examples of how the Principles are used in daily decision-making and how their integration is impacting the daily lives of the Elder care partners being served. The sharing of stories is a powerful tool that leaders have to engage the hearts and minds of care partners in the culture change journey. The Path to Mastery Milestone Assessment Tools are designed to capture the story of how each step has been mastered. This story can be used to educate, choose and grow future leaders so that the journey is sustained and moved forward.

- The Path to Mastery, especially Milestone 2 and 3, are about the involvement of the whole care partner team (Elders, employees, volunteers, family members, and others) in the culture change journey.
  - Formal leaders recognize the value of education by developing a plan and providing needed resources for ongoing education throughout the journey. (M1P1)
  - A core leadership team representing different parts of the organization, or different aspects of daily life, has been formed, educated, and is meeting regularly to guide the implementation of The Eden Alternative. (M1O5)
  - Elders, care partners and leaders have worked together to create a vision statement for the Eden journey in our organization. (M2O2)
The Eden Alternative + the Path to Mastery = QAPI

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Elders, families and care partners are working together to create a Caring Community. (M2O5)
Families are welcomed as a participant in the neighborhood/household care partner team. (M2O6)
Learning is happening across neighborhoods/households connecting them to the larger organizational community. (M2O9)
Leadership Team includes formal and informal (those not in a position of formal authority) leaders in the organization. (M2O10)
Meaning has been brought into large events in the lives of all by engaging the whole community. (M2O14)
We set goals and celebrate accomplishments in the Eden journey for the whole organization, teams and individuals. (M2O18)
Elders and care partner’s leadership skills are growing as more people have experience using the Team Leadership Model in group discussions and decision-making. (M3P7)
Everyone belongs to a neighborhood/household team. (M3O1)
Teams have collaboratively defined goals that provide meaning to their work and the Elders’ lives and are successfully accomplishing them. (M3O2h)
All care partners are knowledgeable about the roles and responsibilities necessary to contribute to the care provided to the Elders. (M4O12)
Decisions are in the hands of the Elders, or as close to them as possible. (M4O16)

Our organization has identified all of our sources of data and information relevant to our organization to use for QAPI. This includes data that reflects measures of clinical care; input from caregivers, residents, families, and stakeholders, and other data that reflects the services provided by our organization. For example, we have listed all available measures, indicators or sources of data and carefully selected those that are relevant to our organization that we will use for decision making. Likewise, we have excluded measures that are not currently relevant and that we are not actively using in our decision making process.

- Replace “QAPI” with “assessing the Eden Alternative journey” and you have the understanding that changing the culture of care is not just “soft stuff.” There are measures of success that are included in the rest of this statement that apply to changing the culture of care as well.
- The Eden Alternative reinforces the importance of collecting data to measure success through several tools.
  - Eden Registry Members are asked to submit data annually to assess the progress of their culture change journey.
  - The Eden Alternative Warmth Surveys assess organizational warmth and openness to change. Change consumes warmth. Through these surveys, leaders can get data that can aid them in “warming the organization’s soil” so that change ideas can take root and be implemented successfully.
  - The Eden Alternative Well-Being Assessment Tools can be used for individuals as well as groups of people to determine how changes being made are impacting the seven Domains of Well-Being.
  - The Eden Alternative International Research Team collects articles and data to be shared with others through the Research & Data page at the Eden Alternative website, www.edenalt.org.
For the relevant sources of data we identify, our organization sets targets or goals for desired performance, as well as thresholds for minimum performance. For example, our goal for resident ratings for recommending our facility to family and friends is 100% and our threshold is 85% (meaning we will revise the strategy we are using to reach our goal if we fall below this level).

- The Eden Alternative Warmth Surveys are a great example of how important it is to set threshold values before the surveys are implemented. Without this pre-survey conversation, it is difficult for the leadership team to know if the results require their attention or not. Each Warmth Survey has an analysis packet which includes a threshold setting worksheet to aid leadership teams in evaluating the results. As the Warmth Surveys are repeated from year to year, the organization can continue to monitor the results looking for ongoing improvement or assessing organizational life to determine why the results might be lower than expected.

We have a system to effectively collect, analyze, and display our data to identify opportunities for our organization to make improvements. This includes comparing the results of the data to benchmarks or to our internal performance targets or goals. For example, performance improvement projects or initiatives are selected based on facility performance as compared to national benchmarks, identified best practice, or applicable clinical guidelines.

- The resources provided by the Eden Alternative to help organizations find opportunities to benchmark their results against themselves, as well as others, includes:
  - The Path to Mastery Assessment Tools
  - The annual data submission process for Eden Registry Members
  - Eden Alternative Warmth Surveys
  - Eden Alternative Well-Being Assessments
  - Research & Data page at the Eden Alternative website, www.edenalt.org
- Organizations can also find benchmarking data related to culture change at the Pioneer Network website, www.pioneernetwork.org.

Our organization has, or supports the development of, employees who have skill in analyzing and interpreting data to assess our performance and support our improvement initiatives. For example, our organization provides opportunities for training and education on data collection and measurement methodology to caregivers involved in QAPI.

- Replace “QAPI” with “The Eden Alternative” in the example with this statement. The collection of stories and data related to outcomes from implementing the Eden Alternative Principles is something all care partners should be contributing to.
- The Neighborhood Guide Training provides leaders with education modules to grow empowered team skills in quality improvement tools and processes. That includes goal setting and data collection.
- The GROWTH Model begins the conversation focusing on data and story collection from as many stakeholders as possible to build the case for change. The Model ends with measurement being a part of the action plan implementation as well as the ongoing monitoring that assures the change implemented is successful and sustainable.
• The Eden Alternative has created analysis packets for the Warmth Surveys and Well-Being Assessment Tools to assure that all who use these tools know how to interpret and act on the results.

From our identified opportunities for improvement, we have a systematic and objective way to prioritize the opportunities in order to determine what we will work on. This process takes into consideration input from multiple disciplines, residents and families. This process identifies problems that pose a high risk to residents or caregivers, is frequent in nature, or otherwise impact the safety and quality of life of the residents.

• The Eden Alternative Path to Mastery Assessment Tools are designed to help organizations determine what they have accomplished (or Completed), what they are currently working on (or In Process) and what they want to work on next (or Next Step). There are actually three columns in which they can be capturing this information. There are also places for the story of how each step was accomplished to be documented in real time.

• It is intended that the Path to Mastery, Eden Alternative Warmth Surveys and Well-Being Assessments become a part of the quality improvement and strategic planning process for the organization.
  o We use the Path to Mastery, Principles, Warmth and Well-Being Surveys as a continuous improvement process. (M2O23, M3O33, and M4O7)
  o We are integrating the implementation of the Path to Mastery Milestone accomplishments into the long-range strategic plan for our organization. (M2O24)

When a performance improvement opportunity is identified as a priority, we have a process in place to charter a project. This charter describes the scope and objectives of the project so the team working on it has a clear understanding of what they are being asked to accomplish.

• In the Path to Mastery Milestone 1, there is a tool that has been developed that includes a team chartering process and outline. The tool is entitled, Preparing Teams to Develop the Human Habitat: How Leaders Can Ensure Success.
• The GROWTH Model can be used to guide a team through the process of developing their team charter.
• Through the implementation of the Neighborhood Guide modules, leaders help the teams develop their own mission, vision, code of ethics, team goals, team roles, and decision-making process.

For our Performance Improvement Projects, we have a process in place for documenting what we have done, including highlights, progress, and lessons learned. For example, we have project documentation templates that are consistently used and filed electronically in a standardized fashion for future reference.

• The Path to Mastery Assessment Tools are designed to provide a real-time documentation tool to help Registry Members track what they did to develop mastery in each step. For each step, there is a place to write the story that can include what was done, who was involved, what went well, and what lessons were learned. As organizations go back through the Milestones and
continue to develop their mastery, the story can be expanded to include new mastery skills, potential set-backs and additional lessons learned about sustaining change.

For every Performance Improvement Project, we use measurement to determine if changes to systems and process have been effective. We utilize both process measures and outcome measures to assess impact on resident care and quality of life. For example, if making a change, we measure whether the change has actually occurred and also whether it has had the desired impact on the residents.

- The tools provided by the Eden Alternative to help organizations assess their outcomes include:
  - The Path to Mastery Assessment Tools
  - The annual data submission process for Eden Registry Members
  - Eden Alternative Warmth Surveys
  - Eden Alternative Well-Being Assessments
  - Eden Alternative Principles in Action Tool

- The Learning Circle is a communication tool that the Eden Alternative shares through its education programs. Learning Circles bring a wide variety of care partners together to share their perspectives about any type of topic, including the assessment of Performance Improvement Projects. The Learning Circle creates a safe environment for each person to share their perspective, without evaluation or interruption, with the whole team. It is a powerful tool to collect stories of success, as well as failure, and can lead the group into a problem-solving process where additional improvements can be initiated.

- The Dementia Beyond Drugs Training provides the Solution Circle as a tool to assist teams in evaluating the unmet needs of Elders living with dementia and come up with potential solutions. The Solution Circle is repeated until the team determines that they have found a solution that improves the life of the Elder care partner.

- The “H” in the GROWTH Model is the portion of the conversation that focuses on whether the action plan that was implemented actually achieved the desired outcome(s). If so, then the team moves into an ongoing monitoring process to assure the change remains in place. If not, the team goes back to the action planning step and tries an alternative plan.

- The Three Stages of Eden, as taught to Associates, is designed to be a cyclical process where the vision development drives education which leads to implementation. As implementation moves forward, education and vision are re-evaluated to determine if the implementation plan is making a difference or if adjustments are needed. Identifying, collecting and evaluating data are a part of this three stage process.

Our organization uses a structured process for identifying underlying causes of problems, such as Root Cause Analysis.

- Teaching root cause analysis tools is a part of two Eden Alternative Trainings:
  - Neighborhood Guide Training
  - Leadership Pathways to Culture Change Training
When using Root Cause Analysis to investigate an event or problem, our organization identifies system and process breakdowns and avoids focus on individual performance. For example, if an error occurs, we focus on the process and look for what allowed the error to occur in order to prevent the same situation from happening with another caregiver and another resident.

- The Eden Alternative believes that personal, organizational and physical transformation all work together to make culture change successful. The most important is personal transformation because the culture of the organization grows out of the beliefs, values, attitudes and assumptions of the individuals who are a part of it. Culture drives the actions of the employee care partners including actions that can lead to improvements as well as errors. Education is one way to foster personal transformation but it will not “stick” and make a difference unless organizational transformation happens in alignment with education. It is the integration of organizational system change, along with education and building skills, that leads to sustainable performance improvement.

- The Dementia Beyond Drugs Training provides tools to shift thinking away from the behaviors of Elders living with dementia, focusing instead on an environmental audit. The outcome is to see behaviors as unmet needs and assess what is happening in the environment that could be driving the Elder’s actions. These same skills can be used for all care situations, not just for those Elders living with dementia.

- The Neighborhood Guide Training provides education modules that support this statement:
  - The Neighborhood Guides are taught about creating a Just Culture. They then demonstrate this approach to the teams through their guiding efforts.
  - The empowered teams are taught skills in using the critical thinking, the Five Why’s, Fishbones, and the PDSA cycle.
  - The empowered teams are taught a module on managing complaints which includes the use of root cause analysis tools to determine why the complaint occurred and how the team can prevent it from being repeated.

When systems and process breakdowns have been identified, we consistently link corrective actions with the system and process breakdown, rather than having our default action focus on training education, or asking caregivers to be more careful, or remember a step. We look for ways to assure that change can be sustained. For example, if a policy or procedure was not followed due to distraction or lack of caregivers, the corrective action focuses on eliminating distraction or making changes to staffing levels.

- The Neighborhood Guide Training provides education to the Guides in how to assess why errors occur and how to address them in a manner that supports system change and helps the individual to grow as well.

- The Neighborhood Guide Training modules teach the empowered team members skills in root cause analysis, time management, critical thinking, communication, creating growth plans for one another, and developing policies and procedures.

- The Paradigm Buster, *The Role of Policies and Procedures in Person-Directed Care*, provides guidance and examples of how to bring together a team to design these important tools so that the care partners will be successful in using them by including language and approaches that reinforce person-directed care.
When corrective actions have been identified, our organization puts both process and outcome measures in place in order to determine if the change is happening as expected and that the change has resulted in the desired impact to resident care. For example, when making a change to care practices around fall prevention there is a measure looking at whether the change is being carried out and a measure looking at the impact on fall rate.

- The other impact that is important to culture change organizations with this statement is whether the change has pushed person-directed care forward. Because it can be difficult to measure the impact a change has on the quality of a person’s life, it is easy to choose to implement changes that focus on the quality of treatment. Measuring treatment outcomes is what healthcare professionals have all been taught. It is important when identifying process and outcome measures to assess quality of life and quality of care with equal importance. The Eden Alternative Principles can become a powerful part of the conversation when assessing quality of life. For example:
  - How has the experience of loneliness, helplessness or boredom been improved for this Elder?
  - How has this change created meaning for this Elder?
  - Has this change made treatment the driver or the servant in the Elder’s life?
  - How was the Elder’s decision-making involvement optimized through the process of implementing this change?
  - Has the Elder grown as a person because this change was made?

- The tools provided by the Eden Alternative to help organizations assess their outcomes include:
  - The Path to Mastery Assessment Tools
  - The annual data submission process for Eden Registry Members
  - Eden Alternative Warmth Surveys
  - Eden Alternative Well-Being Assessments
  - Eden Alternative Principles in Action Tool

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making a difference or if adjustments are needed. Identifying, collecting and evaluating data are a part of this three stage process.

When an intervention has been put in place and determined to be successful, our organization measures whether the change has been sustained. For example, if a change is made to the process of medication administration, there is a plan to measure both whether the change is in place, and having the desired impact (this is commonly done at 6 or 12 months).

- The Path to Mastery is based on the idea that mastery is an ongoing, lifelong process. Even though an organization is mastering Milestone 4, there is a need to review and monitor progress on the previous three Milestones to assure the foundation remains strong. Changing the culture of care is a difficult process and can ebb and flow over the years. It is important that the organization remembers where it started, what has been accomplished and how, and is not afraid to go back and regain mastery in the foundational steps when needed. That is why capturing the stories of success and challenges is important within each assessment tool.
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- The Neighborhood Guide Training has measurements of ongoing success built into the implementation process. These include a Neighborhood Guide self-assessment, the Eden Alternative Warmth Surveys and Well-Being Assessments, and the Conditions of Work Effectiveness Questionnaire II Tool (measures employee empowerment).
- The Eden Alternative Warmth Surveys and Well-Being Assessment Tools can measure ongoing success with change efforts. The organization benchmarks against itself over time. The Well-Being Assessment Tools can be used to track results for individuals, teams or large groups over time.