

2005

A model leadership curriculum for managers of an Eden Alternative nursing home

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**A MODEL LEADERSHIP CURRICULUM FOR MANAGERS OF AN EDEN
ALTERNATIVE NURSING HOME**

By

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BA, University of Dayton, 1998**

THESIS

**Submitted to the University of New Hampshire
In Partial Fulfillment of
Requirements for the Degree of**

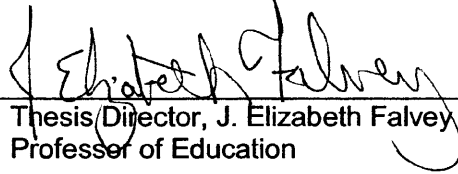
Master of Arts

in

Counseling

December, 2005


This thesis has been examined and approved.



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DEDICATION

I would like to dedicate this thesis to my parents, Marilyn and John Horton, for without them none of this would have been possible. You have allowed me to become the person I am today by providing the opportunities most children only dream of. This thesis is also dedicated to the numerous friends in my life who supported me through this difficult process, your patience and love encouraged me to persevere.

ACKNOWLEDGEMENTS

I would like to extend a heartfelt thank you to the members of my thesis committee: Liz Falvey, Dwight Webb, and Al Power for their time, experience, love and patience. Al, a special acknowledgement goes out to you and the employees at St. John's Nursing Home for showing me what The Eden Alternative is truly about. Your love and support have created a nurturing home in which I was able to grow and learn.

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ABSTRACT

A MODEL LEADERSHIP CURRICULUM FOR MANAGERS OF AN EDEN ALTERNATIVE NURSING HOME

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University of New Hampshire, December, 2005

A nursing home is a difficult environment for staff as well as residents. As a result, some nursing homes are moving toward a more holistic, person-centered approach to care. The Eden Alternative is one of those organizations. Empowerment of direct caregivers and the flattening of the hierarchical structure of the traditional nursing home are two important components of the culture change process known as the Eden Alternative. As a result, management within an Eden environment requires skills different from those in the traditional top-down organizational structure. A model curriculum is outlined to help managers of an Eden Alternative nursing home embrace personal growth and transformation in order to become the type of manager that the Eden Alternative model requires.

INTRODUCTION

The world's population is increasing with every generation. At the same time, improvements in science, medicine and technology are extending life expectancy. In the year 1900, a person was only expected to live an average of 47.2 years (American Association for Retired Persons, 2002). Today, a person's life expectancy has reached an all-time high of 77.6 years (United States Department of Health and Human Services, Centers for Disease Control and Prevention [CDC], 2005).

As people age, often their ability to take care of themselves diminishes. Health and functional ability become compromised, forcing people to look into alternative living options. Visiting nurse programs, living with relatives who become care providers, assisted living facilities and nursing homes are the primary forms of elder care that exist in the United States today. Of these people, over 1.6 million find themselves living in 18,000 nursing homes across the United States (CDC, 2005).

Nursing homes are most often the last option elders choose. A common sentiment is that nursing homes are dreary places where people go to die. However, an increasing number of organizations are transforming the traditional nursing home into a more nurturing, life-affirming environment. One of these organizations is The Eden Alternative (Thomas, 1996). The Eden Alternative believes that the medical model upon which nursing homes are based does not serve elders in a holistic manner. Furthermore, the institutional environment compounds human suffering by regimenting the life of the elder, stripping it of meaning. The Eden Alternative has identified three diseases of the human spirit: loneliness, helplessness and boredom – conditions for which there are no effective medical treatments but which respond to a more holistic approach to care.

Studies of Eden homes have shown many positive outcomes for the elders who live there (see chapter II). Unfortunately, few studies have been conducted on the Eden Alternative and its impact on nursing home *staff*.

Nursing homes are difficult places to work. Burnout is a common experience of those who deal with death, illness and suffering on a daily basis. Attending to the activities of daily living of others is strenuous and draining. All too often, staff members do not feel appreciated for their efforts because elders may not be lucid enough to express their gratitude, and elders' families may be going through their own guilt feelings related to their inability to care for their loved one on their own. Therefore, workplace culture and morale are extremely important in overcoming the challenges of work in a nursing home.

Anecdotally, the Eden Alternative has been shown to increase staff satisfaction and reduce staff turnover. However, the Eden transformation is a long and often difficult process for employees who have spent years working in a traditional institutional environment.

The culture change process can be particularly threatening to people in middle management positions. Empowerment of frontline caregivers and the flattening of the hierarchical structure of the traditional nursing home are two important components of the Eden Alternative pathway (discussed further in Chapter II). Managers may feel that these changes undermine their authority and sense of worth. Management within an Eden environment requires skills different from those in the traditional top-down organizational structure. Because the Eden Alternative strives to move decision-making toward elders and direct caregivers, Eden managers act as mentors rather than traditional directors. As such, rather than dictating policy and procedures, an Eden manager provides information, resources and support.

In order to embrace this new role, managers must be willing to view this change as a growth experience. To change one's identity and role within an organization requires personal growth. An Eden environment requires managers to interact with their employees in a new way. Managers who are committed to shared decision-making must understand their own values and the values and talents of those around them. By understanding how people express these values through different personality styles, a manager can see diversity as a powerful resource rather than a barrier.

It is therefore incumbent upon Eden leadership to help middle managers embrace personal growth and transformation before they can be expected to become the type of manager that the Eden Alternative model requires.

CHAPTER I

RATIONALE

Elders in America

The number of elders, defined as people 65 years of age or older, in the United States population is increasing with every year. The elder population numbered 35.6 million in 2002, an increase of 3.3 million (10.2%) since 1992. Over 2 million people celebrated their 65th birthday in 2002. By the year 2030, there are predicted to be about 71.5 million elders. This is more than twice the number in 1997. People 65+ represented 13% of the population in the year 2000 but will comprise 20% by 2030. Currently, about one in every eight Americans is an elder (United States Administration on Aging, 2004).

Life expectancy also increases with every year, largely due to advances in science, technology and medicine. These advances have led to a reduction in infant and maternal mortality rates, a lower incidence of death due to disease, and improvements in nutrition and medication. A person born in 1997 could anticipate a life span of 76.5 years. This is 29 years more than a person born in 1900 could expect to live. "Almost two million persons celebrated their 65th birthday in 1997 (5,335 per day). In the same year, over 1.7 million persons 65 or older died, resulting in a net increase of 214,000 (587 per day)" (Administration on Aging, 2003). Today, persons reaching 65 have an average life expectancy of an additional 18.1 years. Projections indicate that the number of people living past the age of 85 will increase from 4.6 million in 2002 to 9.6 million in 2030 (Administration on Aging, 2003). The Administration on Aging also reports that, while only 1.4 million (4%) of the 65+ population resided in nursing homes in 1995, the number increased drastically with age, shifting from 1% for those 65-74

years to 5% for those 75-84 years and 15% for those 85+ (Administration on Aging, 2003).

With the predicted increase in number of elders in the community, the increase in life expectancy, and evidence that the need for nursing home care increases with advancing age, it is postulated that there will be an increased need for comprehensive nursing home care for elders in the future.

Nursing Homes in America

Currently, there are 18,000 nursing facilities in the United States maintaining 1.9 million beds (CDC, 2005). Nursing home staff provide twenty-four hour comprehensive medical care, skilled nursing and rehabilitative services, assistance with activities of daily living, and socialization opportunities for elders in their care. The cost of this sort of comprehensive care, however, can be prohibitive to the finances of an individual or their family. Annually, an individual may expect to pay an average of \$100,000 for nursing home care, or approximately \$275.00 per day (Power, personal conversation, March 10, 2005). While some families do pay expenses out-of-pocket, 8% of monies spent on long-term care are reimbursed by Medicare and 68% are reimbursed by Medicaid, leaving only 24% to be reimbursed through private pay. The cost to society increases with each elder on Medicaid or Medicare. Medicaid, which insures most patients in nursing homes, pays \$85.05 per diem, while Medicare has a \$234.00 average per diem rate (American Health Care Association, 2004).

Millions of dollars are also spent annually on prescriptions for elder Americans. In recent years, prescription costs have skyrocketed and a plethora of pharmaceuticals are available for the treatment of illness, both physical and mental. Elders are taking a multitude of prescription drugs in order to combat the affects of aging on their bodies. But are all the medications always necessary? In the case of the phenomenon known as "sundowning" when elders with dementia become agitated during the evening hours,

they are often given a sedative in an attempt to quiet and sooth them. The reality is that these drugs are often not treating an ailment; they are only covering symptoms of the larger problem. What that problem is exactly, has been the topic of much speculation. One popular opinion is that sundowning is a phenomenon brought about by shift change in the nursing home. These changes bring about emotional responses in dementia patients, causing them to become agitated. Studies have shown that the agitation associated with sundowning can be soothed by personal touch, interaction and attention of another human being. But unfortunately, the daily rigor of a nurse or nursing assistant's job often does not allow for this personal contact. A quick fix is a sedative to sooth the agitation (Power, personal communication, January 10, 2005). According to the Health Care Financing Administration, 11% of nursing homes in 1996 were cited for dispensing unnecessary drugs. This percentage rose from only 2% in 1992 (AHCA, 1999).

The Eden Alternative

There is an alternative philosophy emerging within long-term care. The New American Webster Dictionary (1995) defines "Eden" as "*n.* 1, the garden that was the first home of Adam and Eve. 2, any delightful region or residence; a paradise" (p. 222).

Dr. William Thomas, founder of The Eden Alternative, has his own definition of "Eden":

The Eden Alternative is a new way of thinking about nursing homes. It employs the principles of ecology and anthropology in the struggle to improve elders' quality of life. It encourages the leaders of nursing homes to think less like administrators and more like naturalists. Finally, it summons us all to construct vibrant, supple, human habitats in which residents can live" (Thomas, 1996, p. 2).

"The major barriers to growth in a nursing home - loneliness, helplessness, and boredom - are three afflictions that count for the bulk of suffering" (Thomas, 1996, p. 27).

In Life worth living: How someone you love can still enjoy life in a nursing home: The Eden Alternative in action, Thomas lists basic human needs which are commonly

neglected in nursing homes: the need for companionship, the need to care for others, and the need for variety. According to Thomas (1996), empowerment of both caregivers and elders is vital to the process of Edenizing. Increasing personal empowerment of direct caregivers and elders involves creating a human habitat. Adding natural elements such as animals, plants, and children to that human habitat allows for satisfaction of the often neglected human needs for companionship, for variety, and caring for others (Thomas, 1996). The Eden Alternative explicitly emphasizes resident participation in decision making, staff/resident collaboration, and staff teamwork in developing community life and holistic resident well-being.

When the Eden Alternative was first developed, there was excessive focus placed on the plants, animals and children being introduced into the nursing home environment. Still today, many people initially believe that nursing homes implementing the Eden Alternative simply import dogs, cats, birds, plants and children into their home and call it Eden. However, in the past five years much education and emphasis has been placed on the importance of empowerment of staff and elders, and creating nurturing relationships among all people in the nursing home.

Due to the relative newness of the Eden Alternative, there is limited research on the model itself. What does exist in the research documents the effectiveness of the Eden Alternative for the customer: the elder. The current model curriculum will serve to provide resources that allow managers begin to develop the skills necessary to become an Eden Alternative nursing home manager (see definition). Within each Eden Alternative setting, the employees are the catalysts for that facility's culture change. Without individual growth, culture change in Eden is not possible. Therefore, it is important to develop a curriculum which facilitates changes within individual employees.

Current Trends in Eldercare

Shifts in trends are being noted in the healthcare industry, specifically in the area of long-term care. In April of 2002, the World Assembly on Aging adopted the International Plan of Action on Aging 2002 ("The Plan") which seeks to ensure that all people will age with security and dignity, and continue to participate in their societies as citizens with full rights. The Eden Alternative is implementing this "plan." By empowering staff and creating a human habitat, Eden is giving power back to elders. The Eden Alternative is committed to creating places for people to live while combating the stigma that nursing homes are places to die. Eden recognizes that people don't stop growing until they cease to breathe. By creating a culture of nurturing, positive relationships, and respect for each human being, Edenizing nursing homes hope to make the lives of both elders and staff more enriching and more rewarding.

The Eden Alternative is not the only model which is emerging as a trend designed to change long-term care from the traditional medical model. Person-Centered Care, Action Pact, and the Wellspring approach are all models of culture change within long-term care. Each will be examined in the next chapter.

Implications

It is speculated that the outcomes of the current paper will lend information to organizations including, but not limited to, nursing homes going through culture change. It is assumed that most of the knowledge generated from this study will be generalizable to other nursing homes and organizations experiencing culture change, particularly that which is brought about by implementation of the Eden Alternative. Further, it is hoped that this study will begin to identify ways in which an Edenizing organization can foster management growth within culture change.

Studies conducted on the Eden Alternative have suggested that Eden is successful at reducing the three plagues of nursing homes: loneliness, helplessness and

boredom. However, there has been no research looking at the process of management growth in implementing the Eden Alternative. Culture change can be a traumatic and unsettling time for an organization. Mistrust, doubt, fear, and even overt or covert sabotage can disrupt positive intentions when change is introduced into a workplace. The implication for this curriculum would be to add to the knowledge base which redefines managers' roles in nursing homes implementing the Eden Alternative. Changes within staff as a result of management personal growth and development will influence the lives of elders residing in long-term care facilities.

The implication of such a curriculum for counseling would be to give professional counselors ways in which to understand the role of personal growth and development of managers within Edenizing nursing homes. If counselors employed by or affiliated with nursing homes are assessing residents' quality of life, it is important that they know the potential of culture change, empowered staff, empowered residents, and the benefits of animals, plants, gardens, and children for the institutionalized elders.

Counselors working with elders residing outside the nursing home may also benefit from the topics presented in this paper. Knowledge of the effects of the Eden Alternative has already stretched outside of the nursing home environment and into the homes of elders in the community (i.e. Eden at Home) (Berta, personal conversation, Dec 8, 2004). The Eden Alternative, although at this point only implemented in nursing homes, has the potential to be applicable across a variety of settings. According to Thomas, (1996), "the principles of the Eden Alternative can be applied anywhere people are troubled by loneliness, helplessness, and boredom. The principles remain the same" (p. 171).

Definition of Terms

Culture Change: Culture change in long-term care is an ongoing transformation in the physical, organizational and psycho-social-spiritual environment that is based on person-centered values. Culture change restores control to elders and those who work closest with them (Pioneer Network, n.d.).

Curriculum The skills, performance, attitudes, and values participants are expected to learn from schooling: includes statements of desired participant outcomes, descriptions of materials, and the planned sequence that will be used to help participants attain the outcomes

Direct Caregiver: Those staff employed by a nursing home who have the closest and most continuous contact with the elders living in the nursing home.

Eden Associate: People who have completed a three day training in the principles and practices of the Eden Alternative and have become certified by the Eden Alternative organization as Eden Associates (Eden Alternative Inc., n.d.).

Eden Alternative Nursing Home Manager: A person in a specific job who is in charge of one or more employees. Rejecting the hierarchical structure, it is the job of an Eden manager to tap into the talents of those employees and use those talents as resources. Managers are the catalyst for the facility's culture change.

Elder: For the purpose of this thesis, a person 65 years of age or older.

Leadership: The ability to influence others to bring about positive change

Leadership Group: Members of *administration* and *department directors* who make the initial commitment to the Eden Alternative and combating the three plagues of elders. The Leadership Group guides the implementation of Eden Alternative Pathway (Berta, 2004).

Leadership Soil Warming: Developing relationships and producing positive culture among the Leadership Group of an Edenizing Nursing Home. Doing so helps to foster trust among administrators and directors associated with the facility and will begin the process of culture change.

Soil Warming: Developing personal growth, leadership, empowerment and positive culture within an Edenizing Nursing Home in order to foster trust between and ownership within all humans associated with the facility, while cultivating “warm” values in the home including trust, optimism, reciprocity and respect (ultimately bringing decision making to the elders and direct caregivers).

The Eden Alternative: A new way of thinking about nursing homes. It employs the principles of ecology and anthropology in the struggle to improve residents’ quality of life. It encourages the leaders of nursing homes to think less like administrators and more like naturalists, and summons them to construct supple human habitats in which residents can live (Thomas, 1996, p. 2).

- **Mission:** To improve the well-being of elders and those who care for them by transforming the communities in which they live and work.
- **Vision:** To eliminate loneliness, helplessness, and boredom (Eden Alternative Inc. n.d.).

The Eden Alternative™ Organizational Structure: An organizational structure represented hierarchically by:

1. **Board of Directors**

2. Eden Alternative Regional Coordinators: The role of the coordinator is to grow the people and organizations in their region who have committed themselves to the Eden Alternative philosophy. Regional coordinators conduct Associate trainings and oversee the Eden Alternative growth.
3. The Eden Alternative Mentor: Certified Eden Alternative Associates who have distinguished themselves through their work to create better living environments for elders and nursing home staff. The Eden Alternative regional coordinators nominate Associates for this honor based on their assessment of the impact the Associate is having in their chosen line of work.
4. Eden Alternative Associates: People who have completed a three-day training in the principles and practices of the Eden Alternative. There are currently over 7,000 Certified Eden Associates (Eden Alternative Inc., n.d.).

CHAPTER II

REVIEW OF THE LITERATURE

Overview

Much research has been conducted on culture change within business. Similarly, much research exists on leadership and management development for business. While these phenomena are separate, they can also be coupled together to produce positive results. If people in an organization can't change, the organization will suffer, because real change isn't motivated by crisis or fear. The best inspiration comes from leaders who can create compelling and positive visions for the future (Byrne, 2005). As well, real change cannot be maintained until the managers within the organization grow first and become people who are able to "look with new eyes" at the place in which they work.

There is much confusion in the literature on what defines "leadership." Is management leadership? Can managers be leaders by virtue of their title or being good at the jobs? Kouzes and Posner (2002) say yes; anyone can be a leader and each person has that ability within them. Kouzes and Posner believe that the world is "updating" its version of what leadership is. No longer are leaders the few charismatic people who are born to be leaders, who are visionaries, and who have a special gift to move progress forward. Instead, they state that the more collaborative person who values people over profits, and who maintains self-awareness, social awareness, and interpersonal skills, is the true leader (Kouzes & Posner, 2002).

Buckingham and Coffman (1999), on the other hand, disagree. "The difference between a manager and a leader is more profound than people think... the company that overlooks this difference will suffer for it" (p. 63). Buckingham and Coffman put

forward the notion that the activities of a manager and a leader are, at their core, different. Great managers look inward – at the company, into each individual and their unique styles, goals, needs and motivation. But great leaders look outward – at competition, broad patterns and alternative future routes.

While the theorists vastly differ on what they believe “leaders” and “managers” to be, both theories are grounded in the idea that the most successful managers must inherently look within themselves and at the people around them, in order to be effective. This is the focus of the current researcher’s curriculum and will be discussed further in this chapter. While some sources in this literature review use “leadership” and “management” interchangeably, they are referring to the same concept as noted above.

Due to the relative newness of The Eden Alternative, there is limited research on the model itself. What does exist in the research documents the effectiveness of the Eden Alternative on the customer: the elders. The current study will serve to document the importance of the Eden Alternative in relation to the staff, specifically managers, employed by the nursing home. For within the Eden Alternative, managers are the catalysts for that facility’s culture change. Therefore, it is important to develop ways in which change is promoted within the individual managers working in the organization. This change can then be translated to direct caregivers who, in turn, will directly affect elders. As trends in coverage for long-term care progress toward reimbursement for wellness, developing programs and curricula which promote positive growth among individual employees will be important in making progress toward creating a positive culture.

The following literature review will be based on information and studies related to the demands of nursing home work and the current state of the industry. Studies related to the Eden Alternative will be reviewed and compared to some of the other culture

change initiatives within long-term care. This literature review will also examine popular theories of leadership and management, with specific focus on a leadership theory by Kouzes and Posner (2002) and a management theory by Buckingham and Coffman (1999). As well, this literature review will investigate various nursing home training models and research pertaining to individual growth as related to job performance.

Nursing Homes and Staff Retention/Turnover

In recent years, nursing homes across the United States employed more than 950,000 nursing staff consisting of Registered Nurses, Licensed Practical Nurses, and Certified Nursing Assistants. Of those 950,000 people, Certified Nursing Assistants (CNAs) held about 617,000 or 65% of those positions (Gregory, 2001). Of 5,394 nursing homes sampled in the 2002 American Health Care Association [AHCA] Survey of Nursing Staff Vacancy and Turnover in Nursing Homes, the highest rate of turnover was among the CNAs at 71.1% (based on 612,017 total CNA positions in the sample). "The high level of turnover among CNAs is of particular concern to nursing homes as CNAs are responsible for the majority of direct, hands-on resident care" (AHCA Health Services Research and Evaluation, 2003, p. 4) Certified Nursing Assistants are the principle caregivers in a nursing home, providing elders with support for activities of daily living including assisting with bowel and bladder, feeding, transporting and bathing elders. Similarly, Directors of Nursing, Staff Registered Nurses and Licensed Practical Nurses also averaged about 47% turnover in 2002 (p. 4).

To compound the high turnover problem, many nursing home professionals indicate that the demand for staffing is going up but that there are fewer people who are interested in careers in the field of elder care. This is true both in terms of direct caregivers as well as at the administration level (Anonymous, 2002; Hutlock, 2003). The short-term challenge is one of staff retention (Anonymous, 2002). Relationships are

important to providing optimum care for elders. This is another problem for elders, as high turnover rates negatively affect quality of care.

While the work of a nursing assistant is often the most difficult work to do in a nursing home, it is also one of the lowest paid positions. In 2002, the median wage for Certified Nursing Assistants was \$9.59 an hour in the United States, with the lowest 10 percent earning less than \$6.98 per hour and the highest 10 percent earning \$13.54 per hour (Bureau of Labor Statistics, U.S. Department of Labor, 2004-05). Because nursing homes operate 24 hours a day, CNAs are often required to work evenings, nights, weekends, and holidays. This type of demanding work schedule has been studied as having a negative impact on mental health (Geiger-Brown, Muntaner, Lipscomb & Trinkoff, 2004).

Studies address the reasons why turnover is so high in the industry, as well as ways in which nursing homes can battle this disruptive phenomenon. According to the research, attrition is related to lack of training, the absence of a career ladder, low pay, high stress and poor morale. A study sponsored by the Kansas Association of Homes and Services for the Aging (Anonymous, 2000) indicates that lack of realistic expectations at the time of hire, feeling abandoned after the first few days on the job, training which is not intensive or experiential enough, and personal circumstances of people who characterize these positions - including lack of transportation and lack of child care - are all very practical reasons why direct caregivers seem to turnover at a high rate.

CNAs are often less educated, entry-level workers who are nevertheless faced with the challenge of setting a high standard of interpersonal interaction and professional conduct. Organizational, social and environmental factors may affect turnover. Stress is an everyday part of the nursing home environment. Pain and illness, death and dying, dealing with elders' family members and the risk of being exposed to infections and

physical violence from elders are an inherent part of long-term care work. Additionally, lack of staff cooperation (attitude problems), perceived prejudgment of residents by other staff, and inadequate communication between staff intensify stress for nursing home CNAs (Gruss, McCann, Edelman, & Farran, 2004; Segal & Qualls, 1999).

Turnover due to a lack of training and mentoring has been addressed by developing curriculum-based programs for CNAs. One successful program is the Achieve job-retention program of Cuyahoga County, Ohio, whose goal is to "increase entry-level employee retention, promote skill building for employee success, and reduce employee absenteeism and turnover" (Zinn, 2004, p. 50).

The Achieve program pairs social workers and job coaches with long-term care employers to help recently hired low-wage, entry-level workers keep their jobs. The program is designed to encourage low-wage workers to set their sights higher for future advancement, which in turn improves job retention. Services are work-site based. Case managers, called Achieve Advisors, keep office hours each week at the nursing homes they serve. They are also available by telephone. Achieve Advisors hold 30- to 45-minute interactive "Lunch & Learn" education sessions at each facility every other week that feature either a speaker or a skill-building presentation. Sessions are held on more than one shift, so that all workers can take advantage of them. They cover a wide range of topics within four core competencies (Personal Wellness, Workplace Skills, Money Matters, and Continuing Education). Among employees' favorite topics have been personal budgeting, understanding the Earned Income Tax Credit, dealing with difficult people in the workplace, goal setting, and stress management (Zinn, 2004).

Twenty-two nursing homes in Northeast Ohio were chosen to participate in a study on the effects of Achieve on retention. These were randomly assigned either to participate in the Achieve program or to serve as controls. To participate in the study, a nursing home had to have hired 20 new entry-level employees during the previous six

months. Individual employees were included in the study based on the following criteria: on the job less than six months at the time of data collection, and employed in entry-level positions, (defined for the nursing home industry as any position in the following five categories: health staff (most Achieve participants fall into this category as state certified nursing assistants), general office staff, protective services staff (including security), food services staff, or building services staff. Data gathered shows retention rates for program participants that average 96% after 30 days of employment, 87% after 60 days, and 82% after 90 days (Zinn, 2004).

One other very successful program is a workforce development program initiative by Mather Lifeways that educates nurses in leadership skills and person-centered care, while providing a career ladder for CNAs through training in clinical and career skills. LEAP is a comprehensive workforce development program that empowers staff and promotes staff-resident relationships through a model of person-centered care. Hundreds of senior living and long-term care communities across the U.S. have participated in LEAP.

The LEAP program consists of two modules which engage participants in a variety of interactive experiences based on concepts from adult-learning theory, including experiential learning, use of audiovisual materials, hands-on demonstrations, and role playing. Lessons begin with introducing new knowledge ("Learning") for staff to employ in their work settings ("Empowering"). Lessons continue with individual and group activities in which participants develop action plans ("Achieving") that they are expected to implement ("Producing"). Module 1 is The Essential Roles of the Nurse in Long-Term Care Nursing. This module trains nursing managers and charge nurses to develop their roles as leaders, gerontological clinical experts, role models, and team builders, and focuses on the relationship between nurses and CNAs. Module 2 is Growing the Heart of Care: Career Development for CNAs, which includes skill

development, a mentorship program for new CNAs, and a career ladder. (An overview of LEAP can be found at www.L-E-A-P.com).

LEAP trains and equips direct care staff with skills that help them feel valued and effective, develop positive relationships with residents and families, sharpen assessment skills, build capable work teams, and release hidden talents. LEAP has significantly increased nursing leadership and nursing staff retention, communication, work effectiveness, job satisfaction, and work empowerment (Mather LifeWays, 2005). Effective workforce development through LEAP has resulted in measurable improvements in quality of care and satisfaction among residents and families.

While the aforementioned programs address the skills-based and support needs of direct caregivers provide information regarding how best to administer care and become empowered, they make the assumption that managers are able to make that transition without their own support network. These programs lack a component that encourages managers to accept responsibility for, and learn skills related to, the way they view, (and consequently manage), their employees. A learned outcome of the Achieve study was that some employees were afraid to seek an Achieve Advisor's help because they didn't want to be seen as having problems. "We've learned to marry social work skills with marketing skills to encourage employees to use our services " (Zinn, 2004). Nursing homes implementing the Eden Alternative cannot assume that their managers possess these interpersonal skills, because traditional hierarchies do not promote this type of management. It is the responsibility of Eden to make sure that Eden managers are, at minimum, able to be sensitive to the needs of their staff by opening themselves up to change, dealing with their own fears, becoming more aware of their staff's needs, and building skills related to shared-decision making within culture change.

Buckingham and Coffman (2002) found that, in general, staff also leave their jobs because of their managers (Anderson, n.d.; Buckingham & Coffman, 1999). Buckingham

and Coffman found that “people leave managers, not companies” (p. 33). The authors’ research finds that turnover is primarily a manager issue, and if organizations have a turnover problem, they should first look to their managers. In the end, retention is about developing and maintaining relationships, respecting one another, and recognizing quality work (Hollinger-Smith, 2003). Similarly, Buckingham and Coffman found that the manager was the “critical player in building a strong workplace” (p. 32). There is no documentation in the long-term care literature of any programs investigating or making recommendations for increasing managerial supervisory responsibility for turnover in their departments. The work of Buckingham and Coffman and their beliefs about managers will be explored further in this chapter. Additionally, this literature review will explore the changing role of managers in nursing homes as a result of the Eden Alternative and other culture change initiatives.

The Eden Alternative Philosophy

The philosophy of the Eden Alternative was conceptualized by Dr. William Thomas, a graduate of Harvard Medical School, physician in family medicine and geriatrics, and writer of Life worth living: How someone you love can still enjoy life in a nursing home (1996). It is in Thomas’ book that we learn about the Eden Alternative pilot study and the Ten Principles of an Edenizing Nursing Home.

Thomas believes that “current practices in long-term care are based on a confusion of care, treatment and kindness” (Thomas, 1996, p. 1). At the root of the problem is the medical model of care. The Eden Alternative philosophy rests in the idea that “loneliness, helpless, and boredom steadily decay our nursing home residents’ spirit” (Thomas, 1996, p. 1). Replacing the medical model of care with a “human habitat” to combat the three plagues of nursing homes: loneliness, helplessness, and boredom, is the premise of the Eden Alternative.

Since writing Life worth living (1996), Thomas has written two other Eden-related books and one Eden handbook. As well, the Texas Long-term care Institute at Texas State University, which is the home site for the Eden Alternative offices, has published Haleigh's almanac: Eden alternative associate training manual (Eden Alternative Inc., 2004). Within this manual, Dr. Thomas' Ten Principles have been written for application within Edenizing:

1. The three plagues of loneliness, helplessness and boredom account for the bulk of suffering among our Elders.
2. An Elder-centered community commits to creating a Human Habitat where life revolves around close and continuing contact with plants, animals and children. It is these relationships that provide the young and old alike with a pathway to a life worth living.
3. Loving companionship is the antidote to loneliness. Elders deserve easy access to human and animal companionship.
4. An Elder-centered community creates opportunity to give as well as receive care. This is the antidote to helplessness.
5. An Elder-centered community imbues daily life with variety and spontaneity by creating an environment in which expected and unpredictable interactions and happenings can take place. This is the antidote to boredom.
6. Meaningless activity corrodes the human spirit. The opportunity to do things that we find meaningful is essential to human health.
7. Medical treatment (medical model) should be the servant of genuine human caring, never its master.
8. An Elder-centered community honors its Elders by de-emphasizing top-down bureaucratic authority, seeking instead to place the maximum possible decision-

making authority into the hands of the Elders or into the hands of those closest to them.

9. Creating an Elder-centered community is a never-ending process. Human growth must never be separated from human life.
10. Wise leadership is the lifeblood of any struggle against the three plagues. For it, there can be no substitute (p.1).

These Ten Principles are to serve as a guideline to understanding the plagues and corresponding antidotes to loneliness, helplessness and boredom among elders in a nursing home. They are also the guidelines to the mission and value statements that a facility creates. "This is the way of the Eden Alternative: it puts forth general principles and... demands that you translate these principles into practices that resonate with your culture, your heritage and your community" (Thomas, 1999, p. 13).

The Eden Alternative is a public commitment to improving the lives of the elders in nursing homes. Although there are risks involved, it is the responsibility of caregivers and administrators to look beyond those risks and see the potential for improving the quality of life for residents which lies in the Eden Alternative. Proper training, education, and performance, coupled with persistence, will reduce the risks involved in implementing the Eden Alternative (Thomas, 1996). It is important to implement the Eden process slowly and thoughtfully in order to take appropriate risks, learn from mistakes, ensure growth and garner benefits for both elders and staff of Edenizing facilities.

Current Research on the Eden Alternative

Starting with the pilot project discussed in Thomas' original book on the Eden Alternative (1996), the majority of the documentation and research conducted on the Eden Alternative focuses on the importance and benefits of Eden for elders. This

includes information concerning reduction in medications for anxiety and depression as well as medications overall, reduction in infections, incontinence, bedsores, bed-bound residents, increase in observed level of control and stimulation, increase in mobility and overall well-being and decrease in deaths. Studies also report reductions in infections, pressure sores and skin problems, and use of restraints Coleman et al., 2002; Hinman & Heyl, 2002.

Thomas' (1996) book discusses research conducted on Chase Memorial Nursing Home (the first Eden demonstration project) located in upstate New York. Chase was compared with another 80-bed nursing home in the same town which served as the control.

Edenizing at Chase changed the facility by introducing over 80 parakeets, 10 finches, 2 lovebirds, 6 cockatiels, 2 canaries, 2 dogs, 4 cats, 1 rabbit, and a flock of chickens. According to Thomas (1996), "the more diverse and complex the habitat becomes, the greater the potential for meaningful interaction" (p. 39). Hundreds of plants dress the rooms and halls of Chase, while flower and vegetable gardens decorate the lawns. Prior to Edenizing, there was no significant difference between Chase and the control facility on mortality rates, level of functioning and use of medications at Chase as compared to the control facility for two years preceding the study (Thomas, 1996).

The three year pilot study at Chase Memorial Nursing Home showed a reduction in medical and administrative indicators such as a 50% decrease in the infection rate, a 71% drop in daily per resident drug costs, and a 26% decrease in nurse aid turnover. Prior to Edenizing of Chase, the researchers analyzed the mortality rates at both nursing homes from January 1990 to December 1993. Chase showed 64 deaths while the control facility showed 67. During the 18 months after Edenizing of Chase there were 15% fewer deaths at Chase (40) than control facility (47). That difference grew to 25% in 1994. Thomas (1996) proposes that the reason for the lower mortality rate at Chase is

the Eden Alternative. "Given it's core emphasis on the promotion of close, continuing contact with pets, plants, children, and the changing seasons, the Eden Alternative supplies an array of new reasons for living" (p. 57).

Additionally, staff turnover rates at Chase fell 26%, reducing training costs. After Edenizing, monthly average overall costs per resident began to decline at Chase while the control facility's costs rose (Thomas, 1996).

While the study above shows significant effects of The Eden Alternative on nursing home elders, it is important to look at this study objectively. The fact that the researcher, who was also the founder of the Eden Alternative, was medical director at Chase at the time of the study could introduce the potential for bias. As the person who is dispensing medications, it is possible that Thomas' beliefs on treating elders more holistically had an effect on the reduction of medications prescribed. As well, as the medical director he had significant impact on those who worked alongside him who also administered treatment.

Given the fact that Thomas' (1996) study, while promising in its results, may have been impacted by Thomas' role in the nursing home, it is important that his study was replicated. The Institute for Quality Improvement in Long-term care [IQILTC] (2000) published a statistical report summary of Eden Alternative outcomes in six different Texas nursing homes. The Institute conducted a two-year longitudinal study on the Eden Alternative in order to find out if Thomas' (1996) findings would be repeated. The total number of beds in the six participating facilities totaled 734. Data on 1) clinical resident information (medications, mobility, pressure sores and skin problems, infections, incidents, deaths) and 2) staff attendance and retention were collected on a monthly basis for the five facilities implementing the Eden Alternative. Pre- and post-surveys were conducted regarding 1) quality of resident life, and 2) quality of staff work life. Each participating nursing home sent four representatives to a one-day workshop to discuss

data collection, teams, leadership, quality of life, quality of care, intergenerational aspects and accounting responsibilities within the study (IQILTC, 2000).

Results of the Texas study indicated no significant difference in the use of medications, but did show a 60 percent reduction in in-house decubitus ulcers (bedsores). As well, pressure sore rates had maintained a downward trend and rates of bedfast residents lowered by 25%, skin infections and behavioral incidents had decreased by 57% and 60% respectively. The use of restraints decreased by 18% in the six facilities, the rate of chairbound residents increased by 8%, and the rate of urinary tract infections also increased by 29% (IQILTC, 2000).

In relation to staff, the Texas study (2000) found that after introduction of the Eden Alternative, there was a 48% reduction in staff absenteeism. The turnover rate among the certified nursing assistants (CNAs) did not show a decrease over the course of the first year. However, comparison of the turnover rates of the participating facilities was below the state average (163%) for turnover. Total number of staff injuries fell by 11% in the six facilities and the numbers of nurses and CNAs who took responsibility for creating and maintaining their own work schedules and self-directed teams increased over the two year period (IQILTC, 2000).

One significant downfall of the Texas Study (IQILTC, 2000) was the lack of an adequate control facility within the study. The researchers did try to include a control facility in their study; "The initial project designed by the Eden Alternative Task Force included monthly tracking at facilities of similar size and geographic location. The corporation which agreed to supply ongoing data, after months of delay in sending data, informed the Task Force that they would be unable to participate" (p.47). Another large corporation agreed very late in the study to send information concerning statistics at their nursing homes; the information was vague but did show, as well, a slight reduction in pressure sores and the use of restraints over the same time period. There were no

significant changes noted in Eden Alternative homes regarding medications as compared to the control facility. While pre- and post- test information is useful in implementing the study, the lack of an adequate control facility makes it difficult to determine whether or not changes in facilities were due to implementation of the Eden Alternative or due to other societal and/or environmental factors (IQILTC, 2000).

When compared with Thomas' (1996) study, the IQILTC study (2000) showed no support of Thomas' study in relation to psychotropic drug use, infection rates, mortality rates or nurses aid turnover. The fact that there was no replication on these levels could, in fact, be due to the difference in the sample size and facility size which was much larger than the Thomas' original study. One reason replication may not have occurred is because it may take longer to implement the Eden Alternative into larger facilities and across many facilities in one state.

Coleman, et al. (2002) examined the effects of the Eden Alternative's systematic introduction of pets, plants, and children into a nursing home, on the quality of life of nursing home residents. Two nursing homes run by the same organization participated. The study site began implementing the Eden Alternative in November 1998. The control site continued a traditional medical model of care. Patient-level data from the Minimum Data Set (MDS), and aggregate data based on staff reports were used to compare the residents at the two sites in terms of cognition, survival, immune function, functional status, and cost of care after one year. The Minimum Data Set is a standardized assessment instrument which collects administrative and clinical information about residents. The MDS collects assessment information on each resident's characteristics, activities of daily living (ADLs), medical needs, mental status, therapy use, and other parameters involved in comprehensive planning for resident care (American Nurses Association [ANA], n.d.).

Quantitative results of the study were not conclusively positive for Eden. After adjusting for baseline differences, follow-up MDS data indicated that the Eden site had significantly greater proportions of residents who had fallen within the past 30 days ($p = .011$) and residents who were experiencing nutritional problems ($p < .001$). Staff report data indicated that, during the study period, the Eden site had significantly higher rates of residents requiring skilled nursing and hypnotic prescriptions, as well as more staff terminations and new hires. The control site had significantly higher rates of residents requiring anxiolytic prescriptions (Coleman et al., 2002).

While quantitative findings from this study indicated no beneficial effects of the Eden Alternative in terms of cognition, functional status, survival, infection rate, or cost of care after one year, qualitative observations at the Eden site indicated that the change was positive for many residents. Again, like the Texas study, this suggests that it may take longer than a year to demonstrate improvements attributable to the Eden Alternative.

The fact that qualitative observations indicate a positive effect of the Eden Alternative on perceived quality of life may be an indicator that the aspects of quality of life being observed through staff reports are not measurable by a tool such as the MDS, which measures functional ability in elders. The aspects that the qualitative data are reporting may include more internal emotional experiences such as happiness, comfort, trust and caring that can be detected by caregivers who have relationships with elders. Also, variations in facility standards for diagnosis may produce higher quantitative results for pain, depression, falls or nutritional issues on the MDS, due to better detection abilities.

Another longitudinal study looked at the influence of the Eden Alternative on the functional status of 135 elders housed in a 167-bed nursing home. Hinman & Heyl (2001) assessed the effects of the Eden Alternative (plants, animals and children) on

residents' physical, mental, emotional, and social function. Data were collected three months before and one year after Eden was implemented. Data were collected from observations of residents' interactions (field reports gathered over 15 visits in five months), ratings from 34 selected functional indicators (physical, mental, environmental and social) in the Minimum Data Set (MDS), and interviews with staff members. Staff interviews consisted of 11 open-ended interview questions that focused on staff perceptions of how the elements of the Eden Alternative had affected resident's physical, mental, social and emotional function.

MDS indicators in this study included ease of distraction, changes in awareness, use of negative statements, repetitive anxious complaints, social interaction, establishing goals, ability to perform tasks and speed of tasks, difference of support needed in the morning and afternoon, use of partial side rails and limb restraints, and antipsychotic medications.

Data from on-site observations and staff interviews provided anecdotal evidence of functional interactions between residents and the animals, plants or children that had been introduced into the environment. These anecdotal reports indicated that the added stimuli in the Edenizing environment helped promote function among residents, particularly in the physical and social domains. However, as with the Coleman et al. (2002) study, no significant changes were found in most of the MDS indicators of functional ability.

Cumulatively, the above studies (Coleman et al., 2002, Hinman & Heyl, 2001; Institute for Quality Improvement in Long-term care, 2000; Thomas, 1996,) indicate that the Eden Alternative has not had a significant impact on the quality of life of elders living in nursing homes. The current researcher believes that the MDS be not be an appropriate instrument by which to measure quality of life. Specifically, the MDS is a statistical report which allows funding to be allocated to nursing homes based on the

amount of care a person needs. Professionals in the nursing homes use the MDS to record, for instance, the number of falls a person has, bedsores they treat, or how many people it takes to walk an elder down the hall. The more falls, the more bedsores, and the more people necessary to move a resident, the more money that nursing home receives for the care of the elder. In essence, this sort of record keeping/reporting is perpetuating a “treat for illness” mentality instead of recording incidents and aspects indicating improved quality of life. Therefore, the fact that these studies have used the MDS as indicators of quality of life is contrary to the purpose of implementing the Eden Alternative to improve the lives of elders. While this study will not contribute to this issue specifically, it is up to eldercare professionals to develop new ways to measure the quality of life for the people they care for rather than relying on the MDS to measure these outcomes.

With the exception of Thomas' (1996) study, the aforementioned studies and scholarly articles indicate no significance of the impact of elements such as plants, animals and children on the lives of elders living in nursing homes. While the environmental changes within Eden may not create an impact, it is being realized that the relationships that are cultivated within that nursing home that are of the utmost impact on all those within the facility. As the Eden Alternative has grown and matured, leaders of the Eden Alternative have learned that there is more to the culture change than the physical environment. Even more than plants, animals and children, Eden is a culture change process that is about relationships; relationships between the elders and environmental elements, but also about relationships between staff and elders and relationships among staff. Indeed, it may be this overemphasis on the physical environment rather than nurturing relationships that is largely responsible for the lack of more significant research outcomes in Eden Alternative homes.

There is an enormous gap in Eden Alternative as well as nursing home culture change research addressing the effect and process of culture change in relation to staff. “The Eden Alternative emphasizes the need to collect research to add to the growing body of information on the outcomes of this revolutionary process” (Hannan & Schaeffer, 1999). The curriculum designed by the current researcher will serve to add significantly to the existing yet limited body of knowledge pertaining to the staff involved in the Eden Alternative as a culture change initiative.

Popular Models of Culture Change in Long-Term Care

The Eden Alternative is not the only culture change movement used in long-term care today. In fact, The Eden Alternative is one of many that fall in the category of “person-centered” or “patient-centered” care. For the purpose of this literature review, the term “patient/person-centered care” will be used.

Person/Patient-Centered Care

Health care has been evolving away from a disease-centered model and toward a patient/person-centered model. It has been realized that, too often, patients must adapt to the customs and regimens of the medical model of care and those who provide that care (health care organizations, physicians, insurance companies, etc), rather than receiving services designed to focus on that individual's needs and preferences (Agency for Healthcare Research and Quality National Institute of Mental Health [AHRQ/NIMH] (2001).

In the older disease-centered model, also known as the medical model of care, physicians make almost all treatment decisions based largely on clinical experience and data from various medical tests. In a patient/person-centered model, patients become active participants in their own care and receive services designed to focus on their individual preferences with input and advice from health professionals (Stanton, 2002). Patient/person-centered care is defined as health care that establishes a partnership

among practitioners, patients and their families (when appropriate) to ensure that decisions respect patients' wants, needs and preferences and solicit patients' input on the education and support they need to make decisions and participate in their own care (Institute of Medicine, 2000). Patient/person-centered care places the person at the center of the care process. The needs, wants and decisions of the patient are weighed heavily in determining the outcomes of care.

The essential dimensions of patient/person-centered care include but are not limited to customized information, communication, education, coordination and integration of care across conditions and settings over time. Decision-making is shared among clinicians as well as with patients and families, patient self-determination is maintained, and self management skills are encouraged. As well, the effective provider-patient partnership is enhanced by cultural competency of health care providers. Simply put, an effective clinician-patient partnership should be the product of a relationship in which the clinician's recommendations are guided by an understanding of the patient as an individual, and their needs and the context in which he or she lives in order to enhance the patients' ability to act on the information provided (AHRQNIMH, 2001).

Multiple studies have shown that patients who are more actively involved in their own care process have more positive outcomes than those who are not, including improvements in health status and decreases in unnecessary use of services (Barry, Fowler, Jr., Mulley, Jr., Henderson, Jr., & Wennberg, 1995; Greenfield, Kaplan, & Ware, Jr., 1985; Greenfield, Kaplan, Ware, Jr., Yano, & Frank, 1988; Wagner et al., 2001; Wagner, Glasgow, et al., 2001;).

One particular study (Greenfield, Kaplan & Ware, 2004) developed an intervention to increase patient involvement in care. Using a treatment algorithm as a guide, patients were help to read their medical record and coached to ask questions and negotiate medical decisions with their physicians during a 20-minute session before their

regularly scheduled doctor visit. In a randomized controlled trial, the researchers compared this intervention with a standard education session of equal length in a clinic for patients with ulcer disease. Six to eight weeks after the trial, patients in the experimental group reported fewer limitations in physical and role-related activities ($p < 0.05$), preferred a more active role in medical decision-making, and were as satisfied with their care as the control group. Analysis of audiotapes of physician-patient interaction showed that patients in the experimental group were twice as effective as control patients in obtaining information from physicians ($p < 0.05$). Results of the intervention included increased involvement in the interaction with the physician, fewer limitations imposed by the disease on patients' functional ability, and increased preference for active involvement in medical decision-making (Greenfield, Kaplan & Ware, 2004).

A similar study by Hutlock (2004) assessed the behavioral dimensions of patient-centered care in a nursing home setting dealing with residents afflicted with dementia. Researchers designed a program to teach person-centered care to CNAs. The training consisted of five different sessions: 1) practical information about residents with dementia; 2) communication techniques; 3) beginning and sustaining life activities specific to the individual; 4) assisting residents with need-driven or agitated behaviors; 5) interacting and relating to their mentors (nurses) and generally recognizing their role in the larger organization (Hutlock, 2004).

Nurses were also offered specific sessions on how to mentor CNAs including 1) observation skills, 2) giving feedback, and 3) goals setting skills. "Literature demonstrated that if you didn't do the mentoring piece, or the coaching piece, you wouldn't be able to sustain results over time" so both a coaching and mentoring aspect were included in the training (Hutlock, 2004, p. 60).

The researchers then used a behaviorally anchored rating system (BARS) to look for specific behaviors being taught in the person-centered care training sessions. Subject matter experts were asked to rate these behaviors. Behaviors were then categorized into seven dimensions and placed in BARS format: 1) non-verbal initiation of person-centered interactions; 2) assistance with independence-oriented tasks; 3) conversation; 4) interaction with residents using unique details of their lives; 5) initiating lifestyle activities; 6) responding to residents' calls for help; and 7) person-centered interaction with family (Hutlock, 2004).

According to the data presented, CNAs were implementing the training skills presented and a trend was noted toward reduced agitated behaviors and also a reduction in depressive symptoms in the persons with dementia. As for staff, improvements were reassuring; data indicated that CNAs were implementing many of the skills they learned in the sessions with a high degree of retention. A more positive attitude was expressed toward their jobs, and many reported improved relationship with their supervisors. There was a 30% reduction in turnover following the intervention (Hutlock, 2004).

One conclusion of the Hutlock (2004) study which is unique to the current curriculum is that one outcome of the study that was not sustained over time was follow through or sustainability with the mentors. "We revamped the curriculum and incorporated the mentoring tools earlier in the training, so that we are teaching person centered mentoring skill sets to nursing staff while teaching person-centered care skills to CNAs" (p.62). Outcomes of this new approach have not yet been reported in the literature.

Patient/person-centered care is applicable across all healthcare arenas: for example, in-patient hospital treatment, medical office visits, mental health care, and residential long-term care to name a few. Because the patient/person-centered model of

care is just that, a model, there are many specific ways of carrying out those person-centered services. The already discussed Eden Alternative Model, the Action Pact Model, and The Wellspring Model are all unique, yet similar ways of providing person-centered care within long-term care. As well, the following models are not only models of patient/person-centered care; they are also models of culture change within long-term care.

Action Pact Model

Action Pact (www.actionpact.com), much like the Eden Alternative model, takes culture change and divides it into six phases using a systematic approach. The phases are as follows (Norton, n.d.):

Phase 1 - The Study Circle - nursing home staff plan to spend up to a year assessing their organization's readiness for change and investigating the types of models that exist in long-term care and other professions. Similar to the Eden Alternative, Action Pact believes a successful culture change journey requires high involvement by many kinds of stakeholders, including all staff and as many residents, family and community members as they can engage. They begin by creating a study circle with a small group of leadership then gradually increase participation of board, staff and informal leaders among residents, families and the broader community (Norton, n.d.).

Phase 2 - The Design Team - the leadership group determines what changes are possible given their financial resources and unique organizational characteristics. Some organizations consider new construction or renovation. Others may not have these options, but can make low-cost changes in the organization to empower staff and bring decision making closer to elders. A design team is assembled and responsible for making sure all stakeholders are represented and that staff, residents and family

members are informed. The new structure of the organization brings leadership staff as close as possible to elders by creating self-directed work teams, cross-training workers, eliminating departmental barriers, flattening the organizational chart, and permanently assigning staff to a particular resident "neighborhood" or "household" (Norton, n.d.).

Phase 3 - Skills Assessment and Development – Phase three ensures that everyone in the organization has the skills and attitudes to bring the culture change vision to fruition. The key is to create a learning climate where leaders are inspired to help others learn and grow. Members of the leadership group must assess existing skills and interests and define those needed in the new culture. Training for culture change happens in all formats; in classrooms, small groups and one-on-one (Norton, n.d.).

Phase 4 - Team Development - If the organization's design incorporates a household, neighborhood or cluster model, leadership begin as soon as possible to identify future team members so they may begin working together and with residents (Norton, n.d.).

Phase 5 – Implementation - This phase begins when design decisions begin to be actualized in staff training and in new job descriptions, work assignments, reporting structures, policies and procedures. The implementation phase is the final dividing line between the old way and the new (Norton, n.d.).

Phase 6 – Evaluation - This phase returns the organization to the beginning of their journey, the Study Circle. A baseline has been established for all Continuous Quality Improvement indicators. That data can now be compared with future data tracked from clinical outcomes, infection control, customer satisfaction, human resources, regulatory compliance, safety/risk management and financial management indicators. From this point, a commitment is made to correct and improve any deficiencies so there is no compromise on quality. In the neighborhood model, everybody shares responsibility for all outcomes of living and working together. This

charges all staff with additional accountability for outcomes, but also obliges the organization to ensure staff is adequately educated and supported in their new responsibilities (Norton, n.d.).

While they do provide a leadership, Action Pact does not provide any structured curriculum around the area of personal growth for managers in the facilities they work with (Norton, personal conversation, October 12, 2005). Action Pact's philosophy, according to Executive Leader, LaVrene Norton, is that if people are completely involved in self-led teams through the culture change process, there is only the occasional and case-by-case need to assist managers in their own growth process. Norton (October 12, 2005) reports that "when managers and directors are part of the change process, there is no sabotage because those people are truly involved in the decision-making process and plan changes together. I can literally tell you the number of times someone has left because they were unhappy, it just doesn't happen."

While Action Pact recognizes that change requires growth on the part of leaders, it is the current researcher's opinion that the culture change organization is failing to address the specific needs of managers to grow out of the task-driven roles they traditionally were part of and become more of a facilitator to the people who work for them. The current curriculum will address this need. While people who are not "in line" with culture change may not outright leave the organization, as Norton stated, they may be effecting the choice of others to have to leave if they are spreading their dissent in other ways.

The Wellspring Model

The Wellspring model of culture change (www.wellspringis.org) is different from other models in that it is comprised of a number of specific elements, and is designed to achieve two goals through transformation to a person-directed care model. The first goal is to enhance the quality of resident care. The second is to enhance the quality of work

life. The Wellspring model is based on the premise that improved quality of care and reductions in staff turnover will have a significant impact on resident quality of care and quality of life. In the Wellspring model, culture change is primarily about increasing 1) the degree of collaboration across departments, 2) the participation of workers across levels of the organization, and 3) organizational development to promote greater collaboration and follow through (Wellspring Institute, 2005).

Care quality and work life quality are both enhanced by 1) improving the skills and knowledge level of all workers, especially front line workers; 2) promoting collaboration among workers involved in care provision; 3) empowering workers to use their new knowledge to create practice changes that will improve care; and 4) establishing an accountability system for improved care outcomes. The Wellspring Model is organized around the following elements:

The Wellspring Alliance – An alliance of Wellspring nursing homes allow nursing home staff to work closely with staff from other facilities in an alliance – sharing resources and collaborating with others to find solutions to challenges (Wellspring Institute, 2005).

The Clinical Modules - a set of education modules that are offered on an ongoing basis to facility staff. Modules are offered in 1) specific clinical areas, 2) developing clinical and organizational assessment skills, and 3) leadership skills in culture change. (A synopsis of each module is available at <http://www.wellspringis.org/modules.html>).

The Care Resource Teams - The Care Resource Teams (CRT) are at the heart of the Wellspring model. Each CRT becomes the organizational resource for one of the Wellspring clinical topic areas, and CRT members become knowledgeable about clinical and organizational issues relevant to their clinical area of focus. CRTs also determine what organizational changes are needed to improve the quality of care in each area, including what is necessary to sustain the changes over time. Each CRT identifies

problems in its designated clinical area, determining the nature and causes of the problem, devising a plan to address the problem, organizing the implementation of the plan, and evaluating the success of the implementation effort (Wellspring Institute, 2005).

The Wellspring Coordinator - Each nursing home designates a Wellspring Coordinator to oversee implementation activities. This person, usually the Director of Staff Development, assists with creating and sustaining the CRTs to ensure they work effectively with unit, department and management representatives. The Coordinator position is vital to the success of Wellspring, and requires an individual who has a sound clinical basis and is, more importantly, a savvy organizational worker (Wellspring Institute, 2005).

Advanced Practice Nurses - Each alliance of 8-10 nursing homes pools its resources to employ a nurse with advanced education in geriatric care (Advanced Practice Nurses, or APNs). Both Nurse Practitioners (NPs) and Clinical Nurse Specialists (CNSs) have been employed in the APN position. The APN serves as an expert consultant to the alliance, as well as to each individual home. The APN consults with nursing home staff on developing better systems of care, interprets data collected through the Wellspring databases, and participates in ongoing staff development (Wellspring Institute, 2005).

The Wellspring Data Systems - Wellspring provides facilities with comprehensive data systems that are web based and user-friendly. One, developed by the company My InnerView (<http://www.myinnerview.com>), provides a tool to easily track key indicators and benchmark performance across six domains: resident quality of life quality of care, family satisfaction, state survey results, employee commitment, and financial health. Data is compiled independently by each facility (Wellspring Institute, 2005).

Other than the Eden Alternative, the Wellspring model is the only culture change model with research to support the effectiveness of the initiative. However, Wellspring only provides one study in the literature reporting statistical findings. This 15-month qualitative assessment and longitudinal data analysis was conducted in order to better understand the impact of Wellspring on eleven nursing homes in Wisconsin implementing Wellspring (Wellspring Institute, 2005).

Conclusions from the Institute for the Future of Aging Services [IFAS] (Stone et al., 2002) indicated that:

- Rates of staff turnover declined or increased more slowly in Wellspring homes
- Wellspring facilities performed better on annual state department of health inspections
- Some evidence suggestions that Wellspring staff are more vigilant in assessing problems in quality and take a more proactive approach to resident care
- Based on observation and interviews, Wellspring residents enjoyed a better quality of life and benefited from improved interaction with the staff.
- No additional increases in net resources were required for the model's implementation.

It is obvious that nursing home culture change initiatives in general need to become more vigilant in documenting the effectiveness of their culture change initiatives as well as the process by which these programs are implemented; doing so will add validity to their cause and improve odds that other medical-model nursing homes may chose a holistic approach as well.

The Eden Alternative's Implementation Pathway

The specific features of the Eden environment are unique to each individual nursing home experiencing the process. No two facilities will implement Eden in exactly the same way. However, a fairly explicit Eden Alternative Implementation Pathway (see outline in APPENDIX A) has been developed to provide guidance for the Leadership Group while implementing Eden (Berta, 2004). This pathway is unique in that other culture change initiatives do not address specific tasks related to implementation. Wellspring and Action Pact act as consultants to an initiative, while Eden gives specific nursing home tools to go forward while providing consultation when necessary, ensuring that the culture change is "owned" by the home. The uniqueness lies in the Implementation Pathway. More of these tools are being developed by Eden, which is allowing this particular model to rise to the forefront of culture change initiatives (for example, the proposed and still being developed, Eden Alternative Pathway Practices - see APPENDIX B). The current model addressing specific needs of Eden Managers will also become part of these Eden tools.

While following this Implementation Pathway, facilities are encouraged to assess their own needs and alter the implementation tools according to their determined needs. It is essential that readers understand the Implementation process in order to understand the complexity and pace of such a process. Implementation is serious; it is slow to occur and it is important that nursing home staff leadership personnel do not force themselves onto a new step in the Pathway before staff determines they are ready. Doing so could result in mistrust, dissention, anger, and resentment toward the Eden change. "We have found that the most successful organizations are those that take the time and make the effort to present and discuss ideas fully. Shortcuts taken here create painful dilemmas in the future. Much effort has been wasted on repairing the damage done by miscommunication and misinterpretation" (Thomas, 1999, p. 1).

Vision Stage Step 1 - Eight Hour Team Training - The Implementation Pathway begins with an 8 Hour Team Training consisting of all nursing home administrators and department directors as well as any Eden Associates. This group represents the Leadership Group referred to in this study. It is important to note that not all nursing homes operate the same way within Eden. Therefore, each Leadership Group may be made up of representation from different departments. During Leadership Group Team Training, administrators and department directors learn about the Eden Alternative's philosophy, principles, and planning processes. An integral part of this training is the understanding that Eden means empowerment of direct caregivers and elders.

Vision Stage Step 2 – Leadership Soil Warming - Leadership Soil Warming is a complicated process characterized by the development of relationships between leadership staff, thereby producing positive culture among the Leadership Group of an Edenizing Nursing Home. Doing so will help to foster trust among administrators and directors associated with the facility and will begin the process of culture change. This group will soil warm for many months or even years before they are ready to introduce the Eden Alternative to the rest of the nursing home. Leaders are continuously “soil warming” in order to continue preparing the staff and residents of the nursing home for continued culture change.

Vision Stage Step 3 - Leadership Vote - During this process, members of the Leadership Group vote to commit themselves fully to the same vision of combating loneliness, helplessness and boredom among the elders in their nursing home. Success depends on assuring that administration and directors within the facility fully understand, and commit to, the human habitat concept and to combating the three plagues of nursing homes. “Without the unanimous and genuine commitment of this group you can be sure that your process will fail at some point in the future” (Thomas, 1999, p.2).

Vision Stage Step 4 – Creation of the Vision and Mission Statements - “The first assignment for the Leadership group is the creation of an Eden Mission and Vision Statement” (Thomas, 1999, p.2). These statements will guide staff in their implementation process. The Eden mission and vision statements are different from those statements emphasizing the mission and vision of the facility itself. “While the organizational mission and vision may be reflected in the Eden mission and vision statement, it should also be a clear picture of what the habitat is to become” (p. 2).

Vision Stage Step Five – Administrator attends Eden Associate Training - Assure that the nursing home administrator attends the Eden Associates Training and has committed him/herself to combating the three plagues of loneliness, helplessness, and boredom.

Vision Stage Step 6 – Soil Warming Throughout Nursing Home Staff - At this point the Leadership Group must honestly assess the readiness of their organization for the Eden Alternative. “We have found that unless the Leadership Group does an analysis of their staff’s strengths and weaknesses in the areas of culture of care, ability to work as teams, ability to communicate and even the ability to conduct meetings and record progress, they may over- or underestimate the time it will take to affect the Eden process” (Thomas, 1999, p.3). Warming promotes leadership and empowerment through continuous growth and personal development. The current curriculum is then, by definition, a part of the general Soil Warming process within Eden and will be a tool/resource for any Eden nursing home that chooses to use it.

Vision Stage Step 7 – Design a Timeline - When the Leadership Group decides that they have done sufficient soil warming, they start designing a timeline for the process of implementation within the facility to keep the things moving forward and to clearly give direction to the implementation process. The timeline will show month-to-month benchmarks to be attained during the education, preparation and planning stages

of implementation. "Some facilities may find that they cannot move forward without intensive education of staff in areas of communication, empowerment and teams" (Thomas, 1999, p.4).

Vision Stage Step 8 - Create Neighborhood Teams on Paper - These teams will represent those in the facility who will work together as "families" or "neighborhoods" within the nursing home. The teams consist of residents and levels of all staff, from housekeeping to payroll, from dietary to administration. Teams, however, will not always be made up of the same composition of people.

The team concept has been defined and redefined over the years and frequently develops into that group of individuals who can best meet the needs of the population of elders. It is important to remember that a team in an Eden habitat crosses department lines, consists of all persons (including elders and family members) committed to improving the lives of a specific group of elders and staff, and has as its main mission the movement of decision making to those persons closest to the elders or the elder him/herself" (Thomas, 1999, p. 4).

Creating teams on paper completes the "vision stage" of the Implementation Pathway. Following, the "education, planning and preparing stage" begins.

Education, Planning and Preparing Stage Step 1 – Basic Eden Education - The Education, Planning and Preparing Stage begins with Basic Eden Education for the entire nursing home and its affiliates including staff, elders, families, and the community. Teams consist of 15-20 elders and are joined by the appropriate numbers/members of staff to meet that team's needs. The Leadership Group will decide how best to educate the groups on the Eden Alternative and what information is appropriate to disseminate. Education occurs with neighborhood teams intact, allowing the team to begin making decisions about what works best for their individual group. As well, when elders and staff make these decisions collaboratively, they both begin to experience ownership over their own lives and work.

Education, Planning and Preparing Stage Step 2 – Process Education - After Basic Education, Process Education begins and the tools for success are used to “begin the work of exploring how life should be lived and worked within their team” (Thomas, 1996, p 5). Haleigh’s Almanac (2002) serves as a reference guide and tool-kit for Process Education. Included are many team building exercises which are intended to build trust and reciprocal support between team members. Team members are also encouraged to record their honest reactions in a personal diary in order to reflect on their own process of leadership development and team building while Soil Warming in their groups.

Education, Planning and Preparing Stage Step 3 – Principle Number One - Finally, in the last step of the Eden Alternative Implementation Pathway, the Leadership Group begins education of Principle One of The Eden Alternative: “the three plagues of loneliness, helplessness and boredom account for the bulk of suffering among our Elders” (Thomas, 1996, p.2). This is the Principle that brings every person associated with Eden together on a shared mission.

After the pathway has been completed, Soil Warming continues. Plants, animals, and children are now ready for implementation into the facility based on decisions the teams make about how best to utilize and care for these living and breathing elements of their human habitat. “Once the team members are aware of what the specific needs of each of the components of the habitat are they will decide how that part of the habitat will be sustained within their team” (Thomas, 1999, p.6). Implementation starts with the understanding of, and commitment to, Principle One and it is important for a facility to recognize that it may take five to eight years to bring all ten Principles of Eden to life in their nursing homes.

The formation of self-directed Neighborhood Teams to begin enacting the Ten Principles cannot proceed until the *managers* (not the administrators, not the directors,

and not the direct care staff) of the organization have embraced the personal journey that allows them to act as enablers to the Teams' performance. This is the point where the traditional hierarchical mindset of those managers can derail the progress of Edenizing. The Executive Director and other leaders of the Eden Alternative Organization have recently recognized the need to develop a more formal curriculum for managers and supervisors.

One of the key leadership principles identified by Executive Director, Nancy Fox, is termed "You Grow First" (Fox, personal communication, May 3, 2005). Please see APPENDIX B for the Eden Alternative pathway practices. This particular pathway emphasizes the need for managers to realize personal growth before they can be expected to foster the growth of their employees, and by extension, the larger nursing home community. This writer's curriculum has been developed to aid the Eden Leadership in teaching this very important principle. Failing to recognize middle management as a group that is specific to the culture change process, neither Action Pact nor Wellspring address the need for personal growth for managers within nursing homes. This is the reason the current researcher chose Eden as a significant "step above" the other culture change models. Eden realizes that people, specifically managers, need assistance in the change process and is willing to commit to that need.

The Roles of Traditional Nursing Home Managers vs. Eden Managers

It is important to have a clear understanding of the traditional role of managers in a nursing home setting. Traditionally, all policy is administered in a top-down fashion: from administration (CEO, Administrator) to department directors (Director of Nursing, Director of Human Resources, etc.), who communicate those policies to managers. Managers may exist across the nursing home structure in the following roles (Power, personal conversation, October 14, 2005):

- Assistant Medical Directors

- Assistant Directors of Nursing (who manage Nurse Managers)
- Nurse Managers – depending on facility size, there may be one nurse manager for every 10-20 nurses and CNAs
- Assistant Director of Social Work – also known as Senior Social Worker
- Protective Services Manager
- Laundry Services Manager
- Housekeeping Manager
- Building and Grounds/Maintenance Manager
- Food Service Managers/Supervisors
- Dietary Manager/Head Dietician
- Head of Pastoral Care
- Rehabilitation Manager
- Pharmacy Manager
- Volunteer Coordinator

Administrators and department directors are usually involved in the writing of policies, the determination of staffing needs, to deal with conflict management related to these policies, and to decide how things will run on a day-to-day basis on the units of a nursing home. Managers then have the responsibility of enacting the policies but often do not have much influence on making them. They also determine what schedules will look like for staff on their unit, as well they conduct the day-to-day monitoring and supervision of direct care employees (nurses, nursing assistants, housekeepers, etc.) Managers in non-health areas, such as administrative services, computer and information systems, finance, and human resources are usually in charge of administrative tasks in their own realm of expertise. While there is some variation in the

operational structure of nursing homes of various size, this is a general outline of how things function (Power, personal conversation, October, 14, 2004).

Management, sometimes fittingly referred to as “middle management,” is in a tough position. In a traditional nursing home, they have little leeway and independence in terms of establishing policies and procedures, but are the first in line to enforce said policies and procedures. Most of the decision making goes up-and-down the chain of command in a traditional nursing home, and managers become/function as a “middle man” for enforcing administrations policies even when they themselves may not believe in what they are enforcing. Managers then have to deal with direct care staff who are directly effected by the decisions of administration, and yet, often due to the hierarchical structure of the organization, have little authority to make decisions regarding direct caregivers’ grievances or issues with policies and procedures (Power, personal conversation, October 14, 2005).

In Eden, nursing home managers are more like coaches or mentors. They take on a catalyst role, advising their “neighborhood” of staff and elders on how best to accomplish the things they want or need for themselves and their neighborhood. While there is obviously some level of policy/procedure that they need to uphold, in Eden these things are less of an issue because decision-making does not come from the top (administration) down the chain of command. This hierarchical structure is flattened in Eden and the decisions are made by the direct care staff and elders of the particular neighborhoods. This is the power of Eden. It is based in caring and trusting relationships.

Managers, who are used to the traditional top-down structure, are going to be asked to make a significant “leap of faith” within Eden but it won’t be without a support network. Which is why the current curriculum is so important; it allows managers to identify themselves and their values, allowing them to open up to the idea of looking

around them for input instead of always looking up the chain of command. It's liberation from a top-down mentality. Miller (1991) reviews the changing face of organization and its need for middle managers to change their roles. "Managers will need retraining at seminars and conference to learn to coach, facilitate, to ask questions rather than supply answers, and to let employees solve problems rather than solving everything for them" (p. 9). Miller (1991) reports that managers need to learn that empowerment of their employees is difficult for managers to take. But the reality of the situation is that managers must accept this new role and that the more they empower their fellow employees, the more power they themselves will have.

Popular Theories of Leadership/Management Development

Jim Kouzes and Barry Posner developed their theory of leadership and its principles and practices in a research project begun in 1983 and conducted over the last two decades. Kouzes and Posner began their research on what people expect of leaders by surveying thousands of business and government executives, asking them "What values (personal traits or characteristics) do you look for and admire in your leader" (p. 24)? Two hundred and twenty five characteristics were identified. After subsequent analysis, the items were reduced to a list of twenty characteristics and a questionnaire was administered to over seventy-five thousand people in North America, Mexico, Western Europe, Asia and Australia. Results were synthesized and three editions of *The Leadership Challenge* (2002) have been published.

Kouzes and Posner (2002) believe that the misguided and outdated belief that leadership can't be learned is a powerful deterrent to leadership development, and that leadership isn't the private reserve of a few charismatic men and women, but rather a process ordinary people use when they're bringing forth the best from others. In effect, if we can liberate the leader in everyone, extraordinary things happen.

Through their research, Kouzes and Posner (2002) developed a theory of leadership in which “traditional systems of rewards and punishments, control and scrutiny, give way to innovation, individual character, and the courage of convictions” (Preface xxiii). *The Leadership Challenge* (2002) offers a set of leadership practices based on the real-world experiences of thousands of people who have been considered leaders in their field. Professionals they interviewed reported that “success in leading is wholly dependent upon the capacity to build and sustain those human relationships that enable people to get extraordinary things done on a regular basis” (p. 21). Above all else, leadership is a relationship.

If leadership is a relationship, what do people expect from that relationship? Kouzes and Posner (2002) found that the values (personal traits) the experts they interviewed most respected in a leader included, above all else, the following characteristics which continuously received over 50% of the response. Leaders need to be 1) honest, 2) forward looking, 3) competent, and 4) inspiring.

“Leadership is a relationship, founded on trust and confidence. Without trust and confidence people don’t take risks. Without risks, there’s no change. Without change, organizations and movements die” (Kouzes & Posner, 2002, p. 12). In effect, if trust and confidence are not embedded in the relationships that managers and directors have with their employees, reciprocity of information will not be honest or effective. This will be a direct detriment to the organization’s culture and the wellbeing of the humans involved in the organization.

Through their decades of research, Kouzes and Posner (2002) have developed five fundamental practices of exemplary leaders: Model the way; Inspire a shared vision; Challenge the process; Enable others to act; and Encourage the heart.

Model the Way

- Find your voice by clarifying your personal values.

- Set the example by aligning actions with shared values.

Inspire a Shared Vision

- Envision the future by imagining exciting and ennobling possibilities.
- Enlist others in a common vision by appealing to shared aspirations.

Challenge the Process

- Search for opportunities by seeking innovative ways to change, grow and improve.
- Experiment and take risks by constantly generating small wins and learning from mistakes.

Enable others to Act

- Foster collaboration by promoting cooperative goals and building trust.
- Strengthen others by sharing power and discretion.

Encourage the Heart

- Recognize contributions by showing appreciation for individual excellence.
- Celebrate the values and victories by creating a spirit of community.

The current curriculum will help nursing homes to allow their managers to assist in “modeling the way” for their staff and “enabling others to act.” These two practices are most relevant to the type of personal development curriculum that the Eden Alternative is lacking for nursing home managers. The current researcher, in cooperation with the Eden Alternative, believes that there is reciprocity within the leadership process. Kouzes and Posner (2002) outline this sentiment very succinctly; “leaders who recognize and celebrate significant accomplishments – who encourage the heart - increase their constituents’ understanding of the commitment to the vision and values. When leaders demonstrate capacity in all of the Five Principles, they show others they have the competence to get extraordinary things done” (p. 39). Any discussion of leadership must

attend to the elements of relationship. “Strategies, tactics, skills, and practices are empty without an understanding of the fundamental human aspirations that connect leaders and constituents” (p. 23).

While Kouzes and Posner (2002) thought that a managerial relationship founded on credibility was the foundation for a relationship where *ordinary* people can become extraordinary leaders, Marcus Buckingham and Curt Coffman (1999) have a philosophy of leadership that is different from that of Kouzes and Posner (2002) but still maintains the same general sentiment about the importance of relationships. The *First Break All the Rules* (1999) theory of leadership proposes that great managers do not believe a person can achieve anything he or she sets his or her mind to; that this is conventional management wisdom and that, in effect, this thinking, or rule, must be broken.

“Conventional wisdom is conventional for a reason: it is easier. It is easier to believe that each employee possesses unlimited potential. It is easier to imagine that the best way to help an employee is by fixing his or her weaknesses. Conventional wisdom is comfortingly, seductively easy” (p. 12). Great managers, according to the authors’ research, don’t even try to help a person overcome his or her weaknesses. Instead, Buckingham and Coffman’s research with thousands of great managers yielded the results that great managers are great, again, because of the relationships they cultivate with their employees (Buckingham & Coffman, 1999).

Buckingham and Coffman (1999) wanted to identify what employees need from their work place and how great managers find and keep talented employees. In twenty-five years, the authors surveyed over a million employees and 80,000 managers, asking them questions on all aspects of their working life, digging deep into answers to find the important needs of working people. “Our research yielded many discoveries, but the most powerful was this: talented employees *need great managers* and *not* a charismatic

leader. How long that employee stays and how productive s/he is while s/he is there is determined by his relationship with his immediate supervisor” (pp.12-13).

Buckingham and Coffman (1999) define the difference between management and leadership, and these authors, like the Eden Alternative, define managers as having a catalyst role. Managers look inward, to the needs of the organization and into the individual finding a way to release the individual's style, personality and talents into performance, while leaders look outward, translate the future, to alternative realities; they are visionaries and strategic thinkers (Buckingham & Coffman, 1999).

Buckingham and Coffman (1999) believe that great managers know that not everyone can do anything they set their mind to. They do not believe managers should help a person overcome weaknesses or treat everyone equally. Instead, they know that it is the job of managers to look at each of their employees and discern their individual talents, playing up that persons' talents in order to foster confidence. From that confidence, those employees will then have the strength to take risks and try new things. They will develop their own unique new set of competencies out of the confidence their manager instilled in them (Buckingham & Coffman, 1999).

In the *First, Break All the Rules* (1999) theory of leadership, a manager is the critical player in building a strong workplace, not the pay, benefits, perks or a charismatic corporate leader. Employees don't put their faith in the myth of great companies or great leaders. For employees there is only their immediate manager (Buckingham & Coffman, 1999).

The link between people and performance was vivid. The most "engaged" workplaces were 50% more likely to have lower turnover, 56% more likely to have higher-than-average customer loyalty, 38% more likely to have above-average productivity, and 27% more likely to report higher profitability (Buckingham & Coffman,

1999). If it is the relationship with the immediate manager that keeps good employees, how do the world's greatest managers find focus and keep talented employees?

"According to Buckingham and Coffman's research, by ignoring conventional wisdom, and by having a willingness to individualize each employee's needs and motivation, thereby turning talent into lasting performance. It's about psychology. It's about getting one more individual to be more productive, more focused, more fulfilled than he was yesterday" (LaBarre, 2001, p. 88).

Buckingham and Coffman's research tells us that the single most important determinant of individual performance is a person's relationship with his or her immediate manager. Without a strong relationship with a manager who sets clear expectations, knows you, trusts you, and invests in you, you're less likely to stay. If managers are clear about the outcome that they want, having arrived at that clarity through personal introspection as well as having a healthy vision of the talents of their teams, they should honor the fact that each employee's nature is irreducibly unique. The best strategy for building a competitive organization is to help individuals become more of who they are.

Research on the Importance of Managers in Culture Change

Although its importance is often recognized, specific details on the process of transforming the culture of an organization are lacking. Culture is composed of behavioral norms that members of an organization follow as they perform their work. These norms are influenced by the behaviors organizational leaders model and reinforce. Consequently, bringing about cultural transformation requires that leaders are capable of exhibiting and reinforcing behaviors that are essential to the desired culture. Many managers are not trained to manage change, which can be anxiety producing for staff, as well as for managers themselves (Barriere, Absib, Ordning, & Rogers, 2002). The

current curriculum will help managers in an Eden Alternative nursing home be able to adapt to the change process.

Roscow (1989) reports that supervisors (managers, in the case of the nursing homes and the current curriculum) are a critical level of management in any organization and that supervisors are often taken for granted during the change process. Roscow (1989) calls this "the rainbow effect." Policy decisions made at the top are executed at the working level, and supervisors, all too often, are neither consulted nor involved until it is too late to consider their opinions. Potential consequences on supervisors in any organizational change process, include: 1) a marked increase in work load and an overextended span of control; 2) threats to their careers and to employment due to the downsizing of their peer group and a reduction in the layers of management; 3) perceived threats due to enhanced power and participation of union representatives (in the case of the current study, direct caregivers); 4) radical changes in work rules without their participation; 5) little or no training to prepare them for their new relationships with workers, union and management (in the case of the current study, direct care staff, out-sourced CNA's and Administration); 6) no perceived recognition or reward: rather a sense of loss of power, security and possibly income; 7) inadequate training in the new managerial style; and 8) the necessity of supporting a team system which they may not consider an added value to the organization (Roscow, 1989).

Roscow (1998) warns that as an organization undergoes a transition, a great effort is likely to be expended on employee training and new forms of employee communication, but very little on supervisors. This, as a result, creates a self-fulfilling prophecy: supervisors are perceived as traditionalists, resistant to change, and threatened by innovations; management (Administration) bypasses them, giving more and more autonomy and power to self-directed teams therefore almost guaranteeing that managers will resist (Roscow, 1989).

Roscow (1989) refers to Uytterhoeven's (1989) article describing the role of middle managers as that of having to wear three hats in fulfilling the general management role. Middle managers must act as in three roles: they relate upward to their bosses as subordinates, they relate downward to teams as supervisors, and they relate laterally to peers as equals in cooperative efforts. Managing on three levels is very demanding, Roscow (1989) equates it to a baseball player having to excel simultaneously in hitting, fielding, and pitching. "The middle manager must be able not only to manage all three relationships, but to shift quickly and frequently from one to another (p.1)."

Culture change not only transforms the culture of a company, but is specifically transforms the nature of management.

Teams are emerging as energy-producing subsystems that depend upon a new breed of manager, perceived as a teacher and a source of support rather than solely as a disciplinarian. Companies must help managers identify and create roles and relationships that are congruent with the changed realities of the organization. They should also support managers in the transition from authoritarian boss to coach, trainer and leader (Roscow, p. 2).

It is therefore necessary for an organization to assist its managers in the culture change process, mentoring them and allowing them to become more of what they expect. The current curriculum will be part of that process for Edenizing nursing homes.

Existing Models

When taking into account what has been done in the past regarding training formats and structures for curriculum of this nature, it is important to first look to the Eden Alternative to outline the expectations of such a meeting. When a nursing home's leadership group (administrators and directors) first begin discussing the ideas of the Eden Alternative and whether or not they feel it is appropriate for their nursing home, leaders get together in informal, community based settings to discuss the important work

that they do. This is called “planting the seed” and it’s part of the first step of the Implementation Pathway (see APPENDIX A). The Eden Alternative believes that whenever you begin any sort of educational process that “planting the seed” is an essential part of that work. The Eden Alternative Handbook (1999) clearly outlines ways in which Eden nursing homes should structure training sessions. The Eden Alternative firmly believes that any event or training that is meant to build relationships must take place off site.

You cannot build the momentum you need by meeting in the thick of your daily operation. Symbolize your desire to leave the status quo behind by removing yourselves from the premises. Some may find it convenient to meet in one of your co-workers homes. If that’s the case, make sure that your host appreciates the special nature of the gathering. If you meet in a public place, make special arrangements ahead of time so that the space will be truly yours. People must feel comfortable before they will be willing to share freely their thoughts and concerns (p. 25).

Eden also recommends that dress should be casual; business attire may remind people of the differences in status that the organizational structure has created among co-workers. Eden gatherings should also involve some element of food preparation and the sharing of at least one meal (Thomas, 1999).

While a curriculum of the current context does not exist in the literature on the Eden Alternative or other culture change models, it is important to look at the format and content of existing personal growth training curricula in order to get an idea of what has been done and how to improve upon existing models.

Webb (1988) discusses a model for leadership development and the need for strong leadership in libraries to create adaptable organizations and to involve employees in the management process. The attributes of the new library leaders who can reach these goals are then discussed. It is suggested that they must: (1) be excellent communicators of values, goals, and new directions; (2) listen carefully to discern emerging organizational and human resource issues; (3) be involved in creating a new

organizational culture based on a real need for change in a library; (4) be able to create and sustain a trust relationship with their employees and the environment which they serve; (5) develop an organizational history and analyze and articulate a library's history; (6) be visionary leaders who can communicate a need for change and inspire employees to create fresh and exciting opportunities for themselves and the organization; (7) provide opportunities for professional and personal growth; (8) act as role models; (9) be involved in career counseling; (10) offer carefully designed and implemented reward systems; (11) reinforce core values through appropriate recruitment and orientation of new staff members; (12) communicate their commitment to change in words and sustained action; and (13) possess the skills to implement new organizational and programmatic changes and build the same skills in their staff.

Webb's (1988) model of leadership development within libraries translates effectively to the work that The Eden Alternative is doing with managers and the current curriculum. The following grid will explain the associations:

Webb's Model For Library Leadership	Eden Alternative Model for Management in Eden
Be excellent communicators of values, goals, and new directions	Education! Leadership as visible part of the Eden structure, Directors and managers supporting the values and mission of Eden
Listen carefully to discern emerging organizational and human resource issues	Increase manger's ability to listen with empathy so there is an indication when people are dissatisfied and creative responses can be developed to stop dissent from being part of the Eden culture
Be involved in creating a new organizational culture based on a real need for change in a library	Be involved in creating the culture change that is Eden by understanding and aligning oneself with the vision of the change within the nursing home
Be able to create and sustain a trust relationship with their employees and the environment which they serve	The understanding of values of self and others will begin to give managers the tools to increase trust should it not already exist; sustain it if it does.
Develop an organizational history and analyze and articulate a library's history	Develop an understanding of Eden and the Ten Principles and be able to not only articulate Eden's place in the nursing home but act on it as well; journaling the home's

	Eden journey. Importance of knowing “stories” of those people living and working in an Eden home.
Be visionary leaders who can communicate a need for change and inspire employees to create fresh and exciting opportunities for themselves and the organization	Be excited about Eden. See the possibilities within the concept and what it will bring to the elders as well as employees
Provide opportunities for professional and personal growth	Skills based and leadership initiatives, as well as the current curriculum.
Act as role models	Managers are the catalysts for Eden. Without managers full support, Eden will not happen in a nursing home. Managers must model the way.
Be involved in career counseling	Managers are the catalysts for assisting staff and elders in getting resources
Offer carefully designed and implemented reward systems	Managers must celebrate accomplishments, focus on the positive and be open to any suggestions for change from <i>all</i> the people around them.
Reinforce core values through appropriate recruitment and orientation of new staff members	Managers must know what they are looking for in new staff members as well as be able to cultivate those qualities in their current staff.
Communicate their commitment to change in words and sustained action	Managers must be able to communicate their commitment to the Eden culture change process in words and in sustained actions which are visible and detectable.
Possess the skills to implement new organizational and programmatic changes and build the same skills in their staff	Managers must possess the skills necessary to implement organizational changes and empower direct caregivers.

There are several ways in which the development of self-knowledge can contribute both to the improvement of management performance and success of the organization (Bourner, 1996). Bourner believes that management effectiveness and personal development are intimately related by 1) clarifying values and personal aims (knowing how you prefer to behave and how you prefer to be); 2) explaining your comfort zone (expanding your boundaries); 3) recognizing profound knowledge (seeking wisdom); 4) reflecting, articulating and acting (telling and retelling your story); 5) behaving with integrity (maintaining integrity); 6) learning to be (acceptance of self); 7)

accepting responsibility (taking responsibility for the world you are creating); 8) seeking wholeness: mind, body and spirit (finding wholeness and balance); and 9) expanding from the inside outwards (bringing out what's in you). These concepts can translate to the Eden Alternative as demonstrated by the current curriculum (Bourner, 1996).

Bourner (1996) believes that while we all think we know ourselves, we cannot truly be certain who we are until we come into situations where we are tested. At work, these situations can be stress-inducing deadlines, questions about the decisions we make, accidents, and situations we have not encountered prior to the moment we are asked to make a decision about them. These situations cause thoughts and feelings that surprise us and behavior that we had not expected. In order to make positive choices and plan for the future, it is necessary to be able to investigate our own actions and reactions. "To understand oneself is not just an interesting past-time, it is crucial for the effective manager. Greater self-knowledge means fewer shocks when the chips are down. For this reason, self-knowledge is not a self-indulgence but the most practical of knowledge" (Bourner, 1996, p. 4). Essentially, you cannot change what you are not aware of about yourself. Therefore, those who do not know themselves on a subconscious level are unable to change themselves (Bourner, 1996).

Developing self-knowledge is also a way of discovering additional personal resources within ourselves that we may not otherwise know we possess. By developing this awareness in our minds with this new or recalled self-knowledge, we can carve out paths to resources we had previously been unable to tap. Similarly, self-knowledge can also help us to find out more about our motivations and our drives. The development of self-knowledge may alert a person to better understand his or her habitual needs which effect work performance and decision-making. Becoming aware of the drivers is the first stage in freeing oneself from them. This means more choices about how to think, feel and

act. Greater self-knowledge also manifests itself in being less controlled by 'drivers' which are, at least partly, out of current conscious awareness (Bourner, 1996).

Finding the "drivers" (values) from which a person reacts, can also help a manager to interact more effectively on an interpersonal level by determining what things "push our buttons" and cause managers to react to employees in a way that prevents or deters trust from developing. "How well the manager manages the part of the organization for which he/she is responsible depends on how well the self is managed, which in turn depends on how well the self is known and understood" (Bourner, 1996, p. 4).

But how does self-development of managers translate to the growth of an organization? According to Zenger and Folkman (2004), leaders who are very engaged in their own self-development tend also to be very effective at developing others. The authors suggest that managers should have a development plan for themselves so that they can then translate their own growth to that of their staff. The basis for this personal development should be the recognition that trust is the one quality upon which all relationships are founded upon. "Having trusting relationships is strongly associated with good teamwork" (p. 14). Zenger and Folkman (2004) conclude that leaders who are trusted share six characteristics: 1) they have consideration for others; 2) they model an open, friendly style; 3) they are non-competitive; 4) they inspire confidence in their abilities and are reliable; 5) they listen with care; and finally 6) they speak with candor: are frank and honest. Similarly, leaders who inspire others 1) have positive expectations of others; 2) get people the resources they need to do their jobs; and 3) ask for input (p. 14).

Gaining insight into oneself is usually accompanied by and translated into greater insight into other people. More understanding of what motivates oneself provides understanding of what motivates others as well. This translates to more realistic

expectations of colleagues and enables a manager to listen more empathetically (Bourner, 1996). The Eden Alternative is committed to the idea that empowerment of staff can increase productivity for an organization.

An article by Dixon (2005) describes the qualities, which should be inherent in a leader. Leaders who try to control events, people, and life actually have less control and stability. Effective leaders can flow with what unfolds because they are centered and grounded in *values* and purpose. Now leaders need inner vision to maintain authenticity and lead with confidence. The disconnect between the exterior image and the interior reality reflects the loss of inner vision, the ability to assess strengths and weaknesses honestly and focus the internal lens to magnify core values and beliefs. Leaders who can't see themselves clearly will have a hard time seeing anything else with clarity (Dixon, 2005). This connects directly with the current researcher's concept of Integrity as outlined in Chapter III.

Lindenfield also recognizes that there are a growing number of businessmen and women who are not necessarily focused on the bottom line. "They are seeking inspiration and ideas for self-improvement programs in the hope that they can transform their organizations into more ethical, caring, sharing communities" (Lindenfield, 1995, pp. 28). This, in effect, is how self-knowledge can create a "pay-it-forward" situation in order to bring out the best organization.

Lindenfield (1995) uses a personal growth curriculum outline for a two day Super Confidence at Work course. While the curriculum itself is not applicable to the current research, it is important to note that Lindenfield reports that upon completing the course, most participants report that not only have they received a tremendous boost of confidence and positive energy, but they have learned many practical skills and strategies. More importantly, participants have acquired and/or reconfirmed the belief that they can change their feelings and their behavior, and are, therefore, more willing to

take personal responsibility for both. Therefore, personal knowledge creates an empowered individual. Empowered individuals create a culture of ownership and personal conviction within a work environment.

Conclusions

The research surveyed in this literature review has compiled theory and evidence in support of the need for and usefulness of the Eden Alternative as a comprehensive and holistic culture change initiative in the long-term care industry. This culture change calls upon the people that work in nursing homes to think less in an organizational, bureaucratic mentality and to approach eldercare in a holistic and naturalistic manner.

The Eden Alternative has discovered that although the Leadership Group may be willing to accept the idea of culture change and move forward, managers are having the hardest time with this new view of eldercare. Managers must be willing to view this change as a growth experience. Managers are the catalysts for a facilities culture change. As managers do unto their staff, their staff does unto the elders. An Eden environment requires managers to interact with their employees in a new way. This new way of thinking is reflected in the Leadership/Management theories discussed by Kouzes and Posner (2002) and Buckingham and Coffman (1999). Both theories present managers as having vital roles within an organization and that those vital roles are built on relationships with a basis in trust and credibility. Trust and credibility come from knowing yourself, when you know your own values and personality; it becomes easier to understand those around you. Managers who are committed to shared decision making must understand their own values and the values and talents of those around them. By understanding how people express these values through different personality styles, a manager can see diversity as a powerful resource rather than a barrier.

It is therefore incumbent upon Eden leadership to help middle managers embrace personal growth and transformation before they can be expected to become

the type of manager that the Eden Alternative model requires. The personal growth of Eden managers can potentially have a positive effect on the colleagues of managers of an Eden Alternative nursing home as a whole. The reported effects of self-knowledge can thus enhance the culture change process while implementing the Eden Alternative in a nursing home.

CHAPTER III

METHODOLOGY

Overview

As a result of the presented research, a model curriculum for managers of an Eden Alternative nursing home will be developed. This curriculum will target managers of an Eden Alternative nursing home and will offer a variety of structured and unstructured person-centered activities aimed at assisting the transition to a positive and productive new roles as managers in an Eden Alternative nursing home. The goals of this curriculum are to:

- provide the opportunity for personal growth for all members of the training;
- provide a clear understanding of the changing role of managers within an Eden Alternative nursing home;
- provide insight into how one's values, beliefs, constructs and experiences affect one's role as a manager as part of an Eden Alternative nursing home;
- provide insight as to how personalities affect group performance and how to be responsible for creating cohesiveness among work teams;
- provide practical tools that are directly related to the changing role of a manager in an Eden Alternative nursing home from command-and-control approach to a collaborative, shared decision-making approach.

Training Format and Structure

The training consists of a three day, closed group retreat for no more than 12 managers from an Eden Alternative nursing home. This number allows members to get to know co-workers they may not know already as well as providing a smaller, more intimate group for the building of trust. Depending on the number of staff at an Eden Alternative nursing home, this number may include the entire staff or it may be only half of the staff. Should it be only half the staff, another training session will be required to make sure that all members of management are involved in training.

When Training Will Occur

This training will occur during the Basic Education phase of the Eden Alternative Implementation Pathway (see APPENDIX A). This is the time when employees of the nursing home who are not members of Leadership (see definitions) will begin to be introduced to the Eden Alternative. As well, direct caregivers will begin to be educated on the Eden Alternative and empowerment. It is an effective time for managers to begin to conceptualize their new roles within Eden.

Length of Training

While the days will run from 8:30 – 4:30, actual training will occur approximately five hours per day for three days, for a total of 15 hours of training. The group is closed so that participants can become familiar and comfortable with one another without the distraction of newcomers and/or deserters. Membership consistency/commitment helps to foster trust in this environment, which may be lacking since participants are co-workers in a stressful work environment.

Location

Given the recommendation of the founder of the Eden Alternative (Thomas, 1999), training sessions will be held off site in a non-clinical, non-work-related setting which is comfortable and private. Ideally, the environment should be homey and

comfortable. There should be no tables creating barriers between participants. As well, participants will have the opportunity to share in one meal per day to assist in the building of community.

Facilitator

The training sessions are led by a facilitator who is a Certified Eden Associate (see definitions) who holds, at minimum, a Master's Degree in Counseling, Social Work or other closely related field. The only exception to the degree requirement would be if the facilitator was the Eden Alternative Regional Coordinator for the represented facility. The facilitator will not be a member of the staff at the nursing home where participants work.

Materials

Each participant will be provided with a small three ring binder in which to keep all the outlines and handouts presented to them in the sessions. The facilitator will bring a three-hole-punch to each session so that participants can place papers in their binder. Ideally, all participants should have access to a computer. If this is not possible, a minimum of one computer with Power Point and internet access should be available to the facilitator. The facilitator will bring a flip chart of paper and markers. Legos or Lincoln Logs will be needed for one exercise.

Evaluation

At the end of the last session, participants will be asked to fill out an evaluation regarding their experience. See APPENDIX U for the evaluation. Recommendations will be taken into account for future trainings.

Day One

8:30 – 9:00 Registration and Continental Breakfast/Coffee

9:00 – 9:15 Introduction of Facilitator, Meeting Facility

At the beginning of the first meeting, the facilitator will introduce him or herself, including a brief synopsis of personal and professional competencies related to leadership development and the Eden Alternative. Specifics about the location are detailed including location of bathrooms, telephones and vending machines. A brief welcome and overview of the logistics of the group (location and duration of meetings) will be given. Participants will also participate in a brief Icebreaker to get to know one another.

Rationale: Some familiarity with the facilitator and of what to expect will help group members orient themselves. As well, it is important for group members to know where facilities are located. The Icebreaker will allow participants to share for the first time in the group and will be very quick, light-hearted and non-threatening (see APPENDIX C – Toilet Paper Icebreaker).

Presentation: As logistical information.

Evaluation: While speaking, the facilitator should be aware of any non-verbal information provided by group members. For example, are group members engaged and interactive or are they sitting slouched in their chair, rolling their eyes or giggling with the person next to them? It is important to note the general sentiment of the group at the start of the training so that the facilitator can accommodate that sentiment and address any necessary concerns of the group members if necessary.

9:15 – 9:45 Introduction of Group Members

Group members may or may not previously know one another. Group members will go through an activity that will allow them to get to know one another.

Presentation: Members will participate in a BINGO game (see APPENDIX D) asking questions of one another and trying to achieve “BINGO” through applying people’s attributes/accomplishments to the required squares. Once someone yells “BINGO,” that person will introduce him or her self and the department they work in. From there, they will announce who filled each of their squares and those people will, in turn, introduce themselves.

Evaluation: This activity can be evaluated by the level that participants engage in talking to other group members and by noting the amount of spontaneous talking and laughing that occurs. Evaluation can continue by noting the amount of information participants share about themselves while introducing themselves. Those who share more are often more engaged and willing to open up. Those who share less may need more time to feel comfortable with the group.

9:45 – 10:15 Overview of Curriculum Goals and Expectations

The facilitator will explain to the group the agenda for the retreat, the curriculum outline and the goals of the training. As well, the facilitator will go over his or her expectations for the course including participation, confidentiality, openness, risk-taking, respect and growth.

Rationale: Group members may be new to this sort of training process, and therefore may be wary of participating. These particular members will be able to hear that while it is expected that they will be open with their feelings and participation, they also hear that confidentiality is to be strictly maintained within this group.

Presentation: The facilitator will explain confidentiality and its significance in a group like this. Group members will be asked to sign a confidentiality statement (See APPENDIX E) in order to stress the significance of upholding the group’s confidentiality. The facilitator will also sign a confidentiality statement to convey his or her intent to remain confidential with the information shared in the group. The facilitator will also

discuss the importance of the group members being willing to commit to their own growth and the growth of their co-workers through sharing and being open during the group sessions.

The goals of the curriculum will be presented after expectations of confidentiality, openness and respect have been presented. An outline of the goals and format of the curriculum is located in APPENDIX F. The facilitator will explain that there are two kinds of openness/growth: 1) the growth of opening yourself up to caring about your own development and that of your employees, and 2) the growth of self which occurs when one commits to the process of change and possibility within the Eden Alternative. This change has the goals of allowing for better, more fulfilling lives for elders living in the facility and also leading to more fulfilling work within their work and the work for these employees.

Evaluation: Again, the facilitator should note the overall “feel” of the group, as well as individual member’s reactions to the presented information. Note who seems open and who seems more apprehensive. Address participants’ concerns as they arise.

10:15 – 11:00 New Roles of Managers in an Eden Alternative Nursing Home

Managers will be involved in a discussion related to the vision of their Leadership Group within the Eden Alternative. The facilitator will previously have arranged for members of their Leadership Group, preferably the CEO or Administrator of the nursing home, to discuss with managers during this time what they see as their future role in the nursing home as Eden Alternative managers.

Rationale: Managers must have a clear understanding of their new roles. And it is important for Leadership (administrators, CEO) to be a part of this understanding process for managers.

Presentation: Members of the Leadership Group are well-versed in the Eden Alternative and know the needs of their organization. Managers will most likely have

many questions regarding their changing roles and leaders should be prepared to answer questions regarding these changes.

Evaluation: Note managers' reaction to changes in their roles. Address any visible concerns of managers and make sure that participants are clear in expectations of them from their Leadership.

11:00 – 11:15 Break

11:15 – 12:00 History of Personal Growth, Leadership Development and Middle Managers in Culture Change

The facilitator will display a Power Point presentation discussing the philosophies of Kouzes and Posner (2002) and Buckingham and Coffman (1999) and research on the effects of culture change on middle managers of an organization (see APPENDIX G for and outline of this presentation). This presentation will also discuss information regarding research investigating the most common reasons employees leave their jobs in nursing homes and how employee personal development improves job performance. The presentation will give background and rationale for how this training is relevant to their work in an Eden Alternative nursing home. An all-group discussion of insights into why the concept of "You Grow First" is so important will follow in light of the information presented.

Rationale: It is important for participants to have some information and background as to the theoretical basis for personal growth and leadership in order to be able to relate these concepts to their work within an Eden facility, as well as their personal values/attributes/professional goals.

Presentation: The presentation (outlined in APPENDIX G) will display some of the highlights of the research performed by Kouzes and Posner (2002), Buckingham and Coffman (1999), and other researchers. The presentation will not display too much detail and will keep the participants engaged in the idea of "You Grow First." The Power Point

presentation will last 25 minutes. The remaining 25 minutes will be spent discussing how what was presented will apply to participants' new role as managers in an Eden Alternative nursing home.

Evaluation: Note whether participants are connecting the vital roles they play as managers in the workplace health of their employees and the nursing home culture as a whole, and how their personal selves impact this relationship.

12:00 – 1:15 SHARED LUNCH

1:15 – 2:45 What is my type?

Participants will have the opportunity to take an adapted version of the Keirsey Temperament Sorter (See APPENDIX H) found at www.humanmetrics.com. This test is based on the Jungian - Myers-Briggs typological approach to personality. After taking the assessment, participants will learn about themselves from the descriptions provided.

Rationale: Learning one's type is a unique perspective into the self. Participants can have fun but also begin to think about themselves, analyzing what traits are prominent in their type description. It is important to note that this test is meant to be used for fun. It should be explained by the facilitator that:

- this tool is designed to increase self-knowledge and self-discovery; in no way is this test a measure of mental wellness or a substitute for therapy
- this tool is a personality inventory that should be viewed as non-judgmental
- all personality types are valuable; no type is healthier or more desirable
- type preferences are tendencies and inclinations, not absolutes
- respect for all people and their approach is implicit; valuing human differences

Presentation: The facilitator will ask participants how many of them have taken a type test prior to this session. Some participants may have experience with either the

Myers-Briggs Type Indicator (MBTI) or another test like the MBTI. Participants will be directed to computers in which they can take the Type Test located at www.humanmetrics.com. If multiple computers are not available, the facilitator can either send the link to the website to participants in advance of the session and ask them to bring their results to this meeting, or if only one computer is available, participants can use a paper copy of the test and, with coordination, results can be tabulated by the facilitator in as little as ten minutes (see APPENDIX H).

Upon completion of the test, participants will have time to read through the description of their type. Types are expressed in a four-letter combination representing the following traits...

Introvert OR Extrovert

Sensing OR Intuitive

Thinking OR Feeling

Judging OR Perceiving

For example: ENFP or INTJ

After participants have finished taking the test, the facilitator distributes descriptions of each manager's given type. (See APPENDIX I for the 16 type descriptions).

Following the type descriptions, the facilitator should lead a group discussion asking participants to volunteer their thoughts on the results of their typology test, generating discussion among the group:

- Is anything different in their descriptions than they anticipated?
- Did they learn anything about themselves or another member of the group?
- Is there anything they feel does not agree with their view of themselves in their description? What about their type might indicate what drew them into eldercare?

- How does their type relate to how they do their work?
- How does their type help them to make elders' lives more comfortable?

Evaluation: The facilitator should pay close attention to how participants react to going through the type test. Do they seem enthusiastic about learning more about themselves? Are they reluctant to discuss the things they learned about themselves through this activity? Any concerns should be addressed throughout the process. The facilitator should reinforce the idea that the first step to anything positive is self acceptance. Participants will need to keep their test results in the binder provided, as they will be used later in the training.

2:45 – 4:15 Values Clarification: Beginning to define ourselves...

Participants will begin to learn more about what they bring to the nursing home environment everyday by virtue of their values and talents.

Rationale: Participants need to know who they are as individuals. They need to understand their values and what it means in light of their position as a manager and their work in an Eden Alternative nursing home.

Presentation: The facilitator will begin by introducing the concept of values of the Eden Alternative by reviewing the Eden Alternative Ten Principles (see APPENDIX J). In an effort to begin examining participants' individual values, participants will be asked to each name a person or people they admire. They will then be asked to be candid in describing the traits and qualities which are admirable in those people. Managers will then be asked to complete two exercises related to clarifying personal values:

1. Values Clarification... cultural, personal and work values (See APPENDIX K)
2. Dare to Share... personal stories reflecting values (See APPENDIX L)

The Clarification of Values: Once a belief becomes part of a person's thinking, it drives the individual to act in a highly specific manner. This is a common understanding of the role of values. No one escapes his/her beliefs. Either consciously or

unconsciously, values guide personal and professional thinking. Therefore, they have a powerful influence on how we think. There are inconsistencies between individuals that are a result of their personal value system – we are unique. While we all might experience the same situations/stimuli, we never experience them the same way. As individuals, we never have the same experience of a single shared event. Values clarification is about acknowledging that individuals have different values and, therefore, are likely to make different decisions about the same topic. The end result is that we, as professionals, can come to terms with their different values and actions. This is why professional trainings like this are so important, since they encourage and allow for professional interactions to discuss and assess values.

3. After completing the values clarification exercises, participants will close by discussing the following quotes:

- "Ordinarily, everything we do is in our self-interest. Everything." – Anthony de Mello
- "You see what you look for and you look for what you know." – Bill Thomas

The point of the quotes is to gain the understanding that people do not operate outside of their values and that values can restrict our thinking. The manager's roles are to begin to see others as having as much valid input as they have. Everyone is closed-minded to some extent. Managers opening themselves up to the diversity of thought and experience in their staff and in the elders will create more opportunity for growth of the organization.

4. Review the Eden Alternative Ten Principles (Appendix J) as a group. Reflect on each principle and how that Eden value is respected in the groups' nursing home.

- Do they currently believe that each of the Ten Principles are valued in their nursing home?

- On their floor?
- In their own work with elders?

Evaluation: The facilitator should be aware of how participants are reacting to this discussion and whether people seem willing to contribute. Note whether people are discussing their own motivations and experiences. Finally, assess the level of comfort among the group.

4:15 – 4:30 Wrap Up

Rationale: It is important to review each day, giving an overview of what was learned and what is to be expected for the next day.

Presentation: The facilitator reviews the day and briefly describes themes that will be discussed during the next morning. As well, there should be an opportunity to ask/answer any questions. In conclusion, members will participate in a learning circle where they are asked to answer the question: “What is one thing you were reminded of about yourself today that you had not thought about in a while? How might it change you even a little bit?”

Evaluation: The facilitator should pay close attention to how members pay attention to the wrap up and by any questions they may have.

Day Two

8:30 – 9:00 Coffee and Muffins/Bagels

9:00 - 9:15 Welcome Back and Check In

Rationale: Regroup and find out how others are doing.

Presentation: The facilitator will lead the group in a check-in, addressing any questions or concerns that may managers may have become aware of over the night.

9:15 -9:45 Role Play – Stereotypical Personalities

Rationale: This is a fun role play, set in the context of a group session in which participants will be able to see how roles exist within a group. The translation can be

made to the nursing home via realization that members of groups often function in roles, those they perpetuate themselves and those that others assign to them.

Presentation: Participants will then partake in a lighthearted role-play in which members of the group will be assigned various “stereotypical” and “characteristic” roles (see APPENDIX M). After participants have read all descriptions of the roles, they will be asked to ad-lib based on the role that they play within the skit. There may have to be two people assigned to each role. At the end, members will be asked to assess how the group functioned given their roles. Discuss. This activity, again, should be humorous and fun.

9:45 - 11:00 Group Dynamics According to Type

Participants will learn what it means to function as a group and how those who are in their group are affected by their strengths and must compensate for their weaker areas.

Rationale: The success of this training depends upon the participation and reciprocity of group members. Participants will be encouraged to take responsibility for their membership in the group by learning about how their personality interacts with others' personalities. They will be encouraged to see, in relation to Eden, how they are not “all-knowing” in the sense that there are many other contributions to be made by the other people around them. Each individual has their own talents; this activity will allow managers to see how other people in the group have talents unique to their own personality style and this knowledge can be translated to their staff dynamics as well.

Presentation: The facilitator will explain the uniqueness of the group given each participants personality and what they bring to the group in terms of their personality make up, their paradigms and their experiences. Using the Type results from the morning session, the facilitator will find document entitled “Appreciating Differences Through Type” in the curriculum (see APPENDIX N). The participants will then be asked

to look at themselves as a group. Given the grid, members will be asked to place themselves as an “X” in the grid (use an overhead projector or a flip chart of paper for this task). This will create a visual representation of what personalities or types are represented by this group. Members will be asked to share their personality type with one another by deciphering what in their description they may feel agrees with them and what doesn’t. From there, the group will have to assess how they feel they will function as a group based on their representation in the type grid. A discussion will ensue addressing the following topics:

- Do they have a good representation of all different types or do they all represent the same types?
- What personalities are they missing – leaving “holes”?
- What types are represented multiple times? What consequences will this have?
- Where might they have to work harder to substantiate what they are naturally missing in this grid?
- How can they determine how they might work well together?

Participants should then develop a list of concrete things (work-related tasks, ideas) that are strengths of group members, creating a go-to sheet for future reference. (i.e. Susan is good at developing organizational flow charts whereas John is good at determining how best to approach an employee concerning a situation). If participants are having a difficult time, the facilitator may consider using index cards with specific work-related tasks on them. The participants can then translate those cards into a list of who does what best.

Evaluation: The facilitator should be aware of participant’s interactions. Are members noting whether they are invested in the group process, willing to share openly

with one another and taking risks? In conclusion, ask the group to honestly evaluate their own process.

11:00 – 11: 15 Break

11:15 – 12:00 The Five Stages of Group Development

Rationale: As members of the management team move closer to the neighborhood teams approach and utilize the talents of their own staff, it is important to recognize the stages of group development and how they may present themselves in neighborhood teams. A work team is a group. Therefore, it is necessary to take a look at how these dynamics might play themselves out in the workplace.

Presentation: Though we belong to many different groups, each one is different, due to a variety of factors: 1) size of the group; 2) how long the group has been together; 3) the combination of personalities in the group; 4) your role within the group; 5) voluntary vs. required participation; and 6) demographics of the group members (age, sex, skill levels, attitudes, etc).

Managers will review the handout on the five stages of group development (see APPENDIX O). While reviewing the materials, encourage participants to discuss various times when groups they have been a part of have gone through one of the stages. In conclusions, make the recommendation to the group that one excellent way to help this process is through journaling – keeping an ongoing record of the group's journey, so that at any stage of the process, managers can look back and see 1) how far they've come; 2) all they have accomplished; 3) how they solved problems along the way; and 4) what lessons have they learned to take to future groups.

Remind the group that even though this group is functioning as an Eden Alternative managers learning group, all of these principles will be even more important for them to consider with the groups they work with, as well as the other committees on which they may serve throughout the nursing home. Thinking about the stages of

groups, have participants reflect on their own experiences with different groups. Can anyone share an experience they have had with a group that worked very well together? Tell the group what worked well with that group, and why they think they were so successful. Compile a list of the qualities that helped these groups succeed.

Evaluation: The facilitator should be aware of how participants are reacting to this discussion and whether people seem willing to contribute. Note whether people are discussing their own group experiences and understand the stages of group development.

12:00 – 1:15 SHARED LUNCH

1:15 - 2:45 Defining Leaders/Talents

Rationale: As Buckingham and Coffman stated in *First, Break All the Rules* (1999), talents are the richness of the employee. While not every person is a leader, everyone has talents. Managers will investigate their own talents and those of their team. The strength of this exercise is that it relies on self-awareness to help managers become more effective at recognizing their own talents and then translating that to members of their work teams.

Presentation: The facilitator will review the thought of Buckingham and Coffman regarding talents:

- People don't change that much. Don't waste time trying to put in what was left out. Draw out what was left in - that's hard enough.
- Set expectations, the goals and standards by which people know what you want them to do and how they will be evaluated when they do it.
- Motivate people, or more precisely, stimulate self-motivation. In order to do this, you must know what your staff excel at individually.
- Skills, knowledge and talents are three very unique things:

- Skills are learned competencies, the how-to of a job. They can be transferred from one person to another.
- Knowledge is what you are aware of, often through experience or study. Like skill, knowledge can be taught and learned.
- A talent, however, is a built-in, recurring theme of personality or behavior.

EXAMPLE: most accountants have learned a lot about bookkeeping, and through practice, have become skillful at arranging numbers, but what really drives most of them is an inherent "need for precision." That is their "talent." Similarly, a skilled nurse may have a "talent" for "comforting frightened elders" in the nursing home. She may also know a lot about medicine and nursing, but it is her "comforting" that characterizes who she really is and how she thinks, feels and acts; her talent.

There are three kinds of talents: striving, thinking, and relating:

- Striving talents explain the "why" of a person, the source of someone's energy and ambition. A "need to be of service, a desire to be on center stage, or a love of helping others are striving talents.
- Thinking talents explain "how" a person operates, how she thinks, makes choices, comes to decisions. Thinking strategically, being open to surprises, or calmness under fire are thinking talents.
- Relating talents put people into the equation. They explain "who" you trust, make friends with or avoid. Believing that "trust must be earned" is a relating talent; so is "avoiding confrontation."

Talents are people's characteristic ways of responding to the world. They govern how we think and act. Shyness is a filter. So are curiosity, fear, entitlement and respect for authority. Someone may know how to do a job, but if their filters are out of sync with the task, the knowledge alone won't produce results. The filters have to be aligned with the task.

Working in teams of two, managers will discuss their talents. What are their recurring patterns of thought, feeling and behavior? They will then reflect on the question: "How would I best manage a person like me?" Following, managers will then be asked to think of the talents others bring to their staff and how those talents could be managed. A worksheet for this exercise is available in APPENDIX P.

Evaluation: The facilitator will walk around the room, taking note of people's conversations and what type of talents they are discussing for each category.

2:45 – 3:00 BREAK

3:00 – 4:15 Lookers and Runners

Rationale: This activity associates managers with the idea of changing mindsets and assumptions which they will need to learn to do in order to start moving decision making closer to elders and the direct care staff.

Presentation: See APPENDIX Q for directions.

Evaluation: Evaluate whether managers are able to make the connection from the game to the workplace. Can managers understand how assumptions get in the way of progress?

4:15 – 4:30 Wrap Up

Rationale: It is important to review each day, giving an overview of what was learned and what is to be expected for the next day.

Presentation: The facilitator reviews the day and briefly describes themes that will be discussed during the next morning. As well, there should be an opportunity to ask/answer any questions. In conclusion, members will participate in a learning circle where they are asked to answer the question, "What is the letter grouping *opposite* of the type I represent? How can I use that description to enhance that side of myself a little more?"

Evaluation: The facilitator should pay close attention to how members pay attention to the wrap up and by any questions they may have.

DAY THREE

8:30 – 9:00 Coffee Muffins and Donuts

9:00 – 10:00 Beginning to define ourselves... in light of Eden.

The principles of the Eden Alternative are very versatile. They have been converted to become applicable to employees of a nursing home.

Presentation: The facilitator will go over the Eden Alternative Ten Principles for Staff (Appendix R). They will reflect on what each of the principles mean to them.

- Which of the ten principles stands out for them and why?
- Which of them does the nursing home need to work on the most?
- Which do they need to work on the most in their own department?
- How might they become more present in their workplace?

Evaluation: The facilitator should be aware of how participants are reacting to this discussion and whether people seem willing to contribute. Note whether people are discussing their own personal feelings toward the ten principles. Do they understand how those principles are reflected (or not reflected) in the community they work in?

10:00 – 11:00 Active Listening

Participants will learn to practice active listening and empathy in their communication.

Rationale: Active listening and empathy are core concepts in effective communication. As well, they are intimately connected with the concepts and principles of the Eden Alternative. In effect, management is a form of counseling at times. Since active listening, including reflection and empathy, are standards in counseling, it is important for managers to realize the importance of these tools and to practice using them effectively.

Présentation: The facilitator will ask participants to explain to them how they know when someone is listening to them. What verbal and non-verbal cues do they receive when someone is actively listening? What verbal and non-verbal cues do they receive when someone is acting as if they're listening but perhaps is not. After a discussion of the basics of active listening and which includes empathy and reflection, participants will practice this concept. A role play will occur (see APPENDIX S). Participants will be asked to evaluate their feelings as both listener and talker. As the talker, what did it feel like to really be listened to? What did it feel like to not be listened to? As the listener, how much did you really feel connected to the talker while not listening vs. while actively listening?

Evaluation: Note whether participants are connecting the active listening process with the vital role they play as managers.

11:00 – 11:15 BREAK

11:15 – 12:00 Flex Time

Rationale: This session will be used for anything the Focus Group recommends, or as time allotted for adjustments to other tools in the current curriculum.

12:00 – 1:15 LUNCH

1:15 – 3:15 Test of Integrity – Matching!

Participants will have the opportunity to engage in a question/topic based discussion about Matching. Matching is the ability to be the same person on the inside and at home, as you are to the outside world and at your place of work. In other words, matching is combining your inner world with your outer world.

Rationale: Participants need to discuss and learn from one another when and if they are true to their integrity. Are they the same person at work that they are at home? When are they? When aren't they? How will this affect the relationships they have with

their staff? Self-knowledge like this will allow participants to return to their work with an awareness of their true selves and allow them to be more genuine while on the job.

Presentation: Help participants understand the following outline:

Three Dimensions of Integrity

- Inner World / Outer World
 - feelings and thoughts / expression and behavior
- Supervisor / Supervisee
 - when I manage / when I'm with my boss
- Everyday Self / Work Self
 - who I am in my personal life / who I am at work

Following, the questions (located in APPENDIX T) will be discussed as a group.

Participants will be asked to share their responses. By now, the group should be “warm” enough that they can feel comfortable sharing this information among the group. This session should be conducted in an open format. The facilitator will use a flip chart and markers in order to write down any key words, phrases or ideas to come back and revisit. Learning points to be emphasized/discussed:

- People have different personalities and look at problems differently.
- The way a group of people can perform can be affected by personalities within the group that need to be appreciated and respected.
- When a group can embrace their diversity and share in decision-making they can outperform individuals and lend to more satisfaction for everyone.
- Shared values and needs of elders are more important in decision making than who actually makes the decisions.

- Employees perform best and are happiest when their input is valued and welcomed.
- As a manager, you are a mentor. Your role is to provide resources and support to your employees to release the talents inside them.
- Being a manager involved presenting a credible “face” to employees.

Evaluation: Note whether participants are sharing openly and taking risks in the information they share. Pay attention to whether they are able to speak openly about fears and worries, about their new roles within the Eden Alternative.

3:15 – 4:00 Wrap Up and Termination

Participants will review what they have learned from this curriculum and will have the opportunity to say goodbye to the group in an effective manner.

Rationale: The current curriculum has occurred in a group setting where personal information was shared and relationships were formed or strengthened. It is important for the group to acknowledge their relationships to one another and the things they have learned from each other, as well as leave the group with an appropriate goodbye through termination.

Presentation: In anticipation of termination, the facilitator should remember to do the following:

- Reinforce the progress that was made during the course of the group.
- Offer suggestions to group members about ways in which they can successfully incorporate what they have learned into their daily work.
- Help group participants brainstorm and anticipate problems that may arise when the group has concluded.
- Allow time for constructive feedback from group members. This includes feedback for the leader as well as feedback for other group members.

- Assist participants in processing their feelings about termination and helping them resolve any unfinished business.
- Educate participants about additional resources that are available to them as supports once the training has ended.
- Make oneself available should the need for individual consultation with group members arise.

Evaluation: Members will fill out an evaluation of the training. See APPENDIX U.

CHAPTER IV

RESULTS

As the result of a Focus Group conducted to review the current curriculum, data was collected in the form of suggestions and recommendations for improvement.

Focus Group

The Focus Group consisted of twelve professionals in the nursing home industry. Five of the Focus Group participants classified themselves as upper level managers, four classified themselves as middle managers; and three as direct care staff. Participants had been employed in the long-term care industry for a combined total of 222 years, ranging from 7 to 36 years (an average of 20.1 years per Focus Group Participant). Nine participants were female and two were male.

The curriculum was presented in a two-hour meeting facilitated by the current researcher which included a formal power point presentation of the information collected in the literature review of Chapter Two and a review of the curriculum in a day-by-day format. Feedback was then solicited from the Focus Group in an open discussion format. Responses and recommendations were recorded on a flip chart. Three specific topics for discussion were also presented to the Focus Group and will be discussed later in this chapter.

Format and Structure

One recommendation was made regarding the format and structure of the proposed curriculum. It was determined that the proposed timing of the training, within the Eden Alternative Implementation Pathway, was not appropriate. Focus Group participants felt that holding the training during the Basic Education Stage was too late.

Participants were concerned that if leaders were soil warming, middle managers were already going to be hearing bits and pieces of what the Eden Alternative was about and perhaps begin to form some opinions, biases and resistances. Suggestions determined that the best time for the training would be during the Vision Stage (see Appendix C), just after the leadership vote occurs when all Directors have committed to Eden and are soil warming.

No Changes

Participants were very pleased to see that the training would occur in a three-day retreat format, stating that it is more effective to conduct a training like this all at once as opposed to spreading it out over time. No changes were recommended for the requirements for the training facilitator, or regarding the length, location, evaluation of or the materials required for the training.

Day One

Recommended Changes

During the section in which the CEO and Administrator come to discuss the new role of managers, Focus Group participants suggested that not only should the CEO and Administrator address the managers, but that this leadership address should be expanded to include all members of the Leadership Group, specifically, each manager's Director. This would be an act of "opening arms up and welcoming middle managers into Eden." The suggestion was made that this section be extended to two hours to allow time for managers and their supervisors (Directors in the Leadership Group) to have a personal conversation about expectations regarding their new role and any changes that managers may have experienced with their Directors since the Leadership Vote. Suggestions were later made (and will be elaborated upon later in this chapter) that the Eden Alternative Staff Ten Principles could be used as a tool in this conversation. As well, one group member encouraged the idea that this conversation include a discussion

of strengths and opportunities for growth in relation to the Eden Alternative Ten Principles and the Staff Ten Principles.

The Focus Group was pleased with the values clarifying exercise during day one and recommended that the facility “wrap” their own set of values into this session, stating that it is important for managers to be living the values that the nursing home established as important to the daily function of life in the nursing home.

No Changes

The Focus Group members reported that the power point presentations outlining the goals of the curriculum and the history of personal leadership development, leadership and culture change in relation to managers were important and valuable to the curriculum. One participant suggested that the power point presentation should be on light instead of dark slides (as the dark slides were more difficult to read) and that certain slides had too many words on them. Changes will be made to the slides.

No changes were recommended for the Myers-Briggs typology test session. One member of the group was concerned that this exercise would be less valuable for more experienced managers who may have taken it prior to this training and/or who are very good at “reading” and determining the needs of their staff.

Day Two

Recommended Changes

A number of recommendations were made concerning the “talents” section of this curriculum. Focus Group members liked the exercises associated with talents but felt that the section explaining talents needed to be changed. One group member felt that the presentation of Buckingham and Coffman’s philosophy regarding talents should be more of a discussion than a presentation. One group member in particular was offended by the idea that Buckingham and Coffman imply that not everyone is a leader and that this sentiment was used as a precursor to the discussion of talents. From there,

Focus Group members had a discussion about what leadership entails and who is and who is not a leader. The final consensus was that this section should become a discussion of what managers feel constitutes a leader and how varied those views can be. One Focus Group member offered her own insights on the experience of being called a “leader,” stating that it made her “very uncomfortable” because it came with “too much responsibility.” Although she knows she has talents and is very good at her job, she does not like to be referred to as a leader. From there, another group member said “but you are a leader.” This spoke to the importance of having a conversation addressing personal feelings and implied/perceived definitions/ideas of what a leader is and what a leader does as a precursor to talents. As well, two Focus Group members stated that the time allotted for the talents activities should be reduced to allow more time for a discussion of integrity/matching (Day Three).

No Changes

No changes were recommended for the sections concerning group dynamics in relation to type (including the role play), or the five stages of group development.

Day Three

Recommended Changes

Focus Group participants expressed that the Staff Ten Principles should be moved to Day One of the curriculum since “they are the basis for why managers are in this training” and can lend themselves well to the conversation between leaders and managers.

Regarding the Staff Ten Principles, participants of the Focus Group paid particular attention to the wording of the Ten Principles to assure that they do, in fact, reflect the values of the Eden Alternative in relation to staff. Two changes were proposed:

- Change the term “caregivers” or “direct care staff” to “staff” or “all staff,”

- Italicize the word “all” when referring to “all staff”

As previously noted, it was recommended that the Staff Ten Principles be introduced on Day One of the training but elaborated upon again in this session.

Focus Group Participants also felt that the section on Integrity, while useful in sharing stories (a big part of Eden), also needed a more structured tool or test regarding integrity. It was the hope of one member of the group that this tool would help managers evaluate how their integrity level *truly* scored, rather than asking questions that allow the managers to just get away with saying “yeah, I already do that.” They also felt this section was deserving of more time in the curriculum. One Focus Group participant suggested that the questions in Appendix V (Test of Integrity – Matching) be more specific to elicit examples of ways in which a manager has “communicated thanks and appreciation” or “communicated displeasure.” So instead of risking participants just talking about what they might do/say/model in response to the topic questions, it forces them to think about what they actually have and have not done/said/modeled.

It was also suggested that, ideally, a two-way evaluation process would be used in an evaluation of the relationship between a manager and their individual staff members. While it was not discussed as an appropriate measure in this training, it could be a “jumping off point” from which a discussion/activity in relation to Integrity/Matching could occur.

No Changes

Focus Group participants felt that the active listening activity was very important in relation to learning how best to manage in an Eden environment and that it is a “fundamental” part of management in an Edenizing nursing home.

Structured Topics for Consideration by the Focus Group

Resistance

The Focus Group was asked whether they thought managers would be resistant to this type of training and whether or not this resistance needed to be discussed in the training. As a result of this question, it was determined that changes previously discussed concerning having Leadership also join the Administrator/CEO in talking to the managers about their new roles on the first day was regarded as important and seen as alleviating resistance. One member of the group commented that having the managers talk directly with their supervisors would allow them to have an open forum to discuss this resistance. As well, Leaders will be expected to be open to hearing about any recent changes they themselves have made as a result of the leadership soil warming, and any hopes for change from either party.

Stress Management/Death and Dying

The Focus Group was asked whether they thought stress management and/or stress management in relation to death and dying should be included as a part of the proposed curriculum. While the group felt that it was an important topic to address, they concurred that the current curriculum was not the appropriate place in which to address these issues. Two group members commented that people deal with grief in very different ways, and that an effective manager would help those people to do that in their own ways. The group agreed that if the curriculum is successful at achieving its stated goals, managers will become more skilled at reading and anticipating the needs of their staff, including the area of stress management and grief.

The curriculum, therefore, while not specifically addressing stress management skills, will help managers more effectively deal with their personal grief issues and those of their staff by increasing self-knowledge, thereby increasing their understanding of others.

Terminology

The group was asked whether they felt using “Edenizing,” “Edenized” and “Edenization” were inconsistent with the terminology used by the Eden Alternative to refer to facilities going through the process. One group member stated that the Eden Alternative always refers to any form of Eden as “Edenizing” because no facility ever becomes fully “Edenized,” reflecting the notion that The Eden Alternative implementation is an active and ongoing process. Changes will be made throughout this paper.

Conclusion

The added value of responses from the Focus Group is that the suggestions and information gained allowed the researcher to further connect the curriculum to the specific needs of the nursing home environment via the expertise and wisdom of years of collective experience in a nursing home environment. Based on feedback from the Focus Group, two major themes were identified as significant areas for modification of the curriculum:

- To incorporate *all* members of the nursing home’s Leadership Group into the conversation regarding new roles of managers on Day One.

As a result, the curriculum will be altered to include the entire Leadership Group, specifically, the Directors who manage the managers involved in the training. The amount of time allotted for this section will be extended to two hours (from 45 minutes) and a meeting between managers and their specific director became part of the curriculum. Directors will be encouraged to introduce the Eden Alternative Ten Principles for Staff (APPENDIX R) into this conversation to use as a tool for a shared conversation on how they, together, can create more of an Eden environment in their department and in their relationship.

- To increase the time allotted for the Test of Integrity-Matching session on Day Three and improve the quality of the questions in this section (Appendix T).

As a result, the questions in APPENDIX T will be altered to allow managers to be more specific when discussing integrity. Focus Group members felt that many of the questions were too “loose” and would allow managers to “get away with” saying that they already act with integrity. Questions will include phrases such as “give and example of...” or “how have you...” These changes will make managers give specific examples of how they have/have not showed integrity in their work relationships.

While the specific activities of the proposed curriculum will not need to be drastically altered, there will need to be some general revisions to the structure of the curriculum. This will affect the order of the Appendices and will also make it necessary to change the times/order of activities.

CHAPTER V

DISCUSSION

Overview

As a result of the presented research, and with the recommendations of the Focus Group, a model curriculum has been developed and modified. The curriculum targets managers of an Eden Alternative nursing home, and offers a variety of structured and unstructured person-centered activities aimed at assisting the transition to positive and productive new roles as managers in an Eden Alternative nursing home. The goals of this curriculum are to:

- provide the opportunity for personal growth for all members of the training;
- provide a clear understanding of the changing role of managers within an Eden Alternative nursing home;
- provide insight into how one's values, beliefs, constructs and experiences affect one's role as a manager;
- provide insight as to how personalities affect group performance and how to be responsible for creating cohesiveness among work teams;
- provide practical tools that are directly related to the changing role of a manager in an Eden Alternative nursing home from a command-and-control approach to a collaborative, shared decision-making approach.

Training Format and Structure

The training consists of a three day, closed group retreat for no more than 12 managers from an Eden Alternative nursing home. This number allows members to get to know co-workers they may not know already as well as providing a smaller, more

intimate group for the building of trust. Depending on the number of staff at an Eden Alternative nursing home, this number may include the entire staff or it may be only half of the staff. Should it be only half the staff, another training session will be required to make sure that all members of management are involved in the training.

When Training Will Occur

At the recommendation of the Focus Group who reviewed this curriculum, this training will occur during the Vision Stage (see Appendix A), just after the leadership vote occurs when all Directors have committed to Eden and are soil warming. It is an appropriate time for managers to begin to conceptualize their new roles within Eden because their Directors are doing the same thing. It was thought by the Focus Group that if managers go through the You Grow First training while Leadership is still soil warming, it would help to avoid middle managers hearing bits and pieces of what the Eden Alternative is about and perhaps beginning to form uninformed opinions, biases and resistances.

Length of Training

While the days will run from 8:30 – 4:30, actual training will occur approximately five hours per day for three days, for a total of 15 hours of training. The group is closed so that participants can become familiar and comfortable with one another without the distraction of newcomers and/or deserters. Membership consistency/commitment helps to foster trust in this environment, which may be lacking since participants are co-workers in a stressful work environment.

Location

Given the recommendation of the founder of the Eden Alternative (Thomas, 1999), training sessions will be held off site in a non-clinical, non-work-related setting which is comfortable and private. Ideally, the environment should be homey and comfortable. There should be no tables creating barriers between participants. As well,

participants will have the opportunity to share in one meal per day to assist in the building of community.

Facilitator

The training sessions will be led by a facilitator who is a Certified Eden Associate (see definitions) who holds, at minimum, a master's degree in Counseling, Social Work or other closely related field. The only exception to the degree requirement would be if the facilitator was the Eden Alternative Regional Coordinator for the represented facility. The facilitator will not be a member of the staff at the nursing home where participants work.

Materials

Each participant will be provided with a small three ring binder in which to keep all outlines and handouts presented to them in the sessions. The facilitator will bring a three-hole-punch to each session so that participants can place papers in their binder. Ideally, all participants should have access to a computer. If this is not possible, a minimum of one computer with Power Point and internet access should be available to the facilitator. The facilitator will bring a flip chart of paper and markers. Legos or Lincoln logs will be needed for one exercise.

Evaluation

At the end of the last session, participants will be asked to fill out a survey regarding their experience. See APPENDIX U for the evaluation. Their feedback and recommendations will be taken into account for future trainings.

Day One

8:30 – 9:00 Registration and Continental Breakfast/Coffee

9:00 – 9:15 Introduction of Facilitator, Meeting Facility

At the beginning of the first meeting, the facilitator will introduce him or herself, including a brief synopsis of personal and professional competencies related to

leadership development and The Eden Alternative. Specifics about the facility are detailed including location of bathrooms, telephones and vending machines. Participants will also participate in a brief Icebreaker to get to know one another.

Rationale: Some familiarity with the facilitator and what to expect will help group members orient themselves. As well, it is important for group members to know where facilities are located. The Icebreaker will allow participants to share for the first time in the group and will be very quick, light-hearted and non-threatening (see APPENDIX C – Toilet Paper Icebreaker).

Presentation: As logistical information.

Evaluation: While speaking, the facilitator should be aware of any non-verbal information provided by group members. For example, are group members engaged and interactive or are they sitting slouched in their chair, rolling their eyes or giggling with the person next to them? It is important to note the general sentiment of the group at the start of the training so that the facilitator can accommodate that sentiment and address any necessary concerns of the group members if necessary.

9:15 – 9:45 Introductions of Group Members

Group members may or may not previously know one another. Group members will go through an activity that will allow them to get to know one another.

Presentation: Members will participate in a BINGO game (see APPENDIX D) asking questions of one another and trying to achieve “BINGO” through applying people’s attributes/accomplishments to the required squares. Once someone yells “BINGO,” that person will introduce him or her self and the department they work in. From there, they will announce who filled each of their squares and those people will, in turn, introduce themselves.

Evaluation: This activity can be evaluated by the level that participants engage in talking to other group members and by noting the amount of spontaneous talking and

laughing that occurs. Evaluation can continue by noting the amount of information participants share about themselves while introducing themselves. Those who share more are often more engaged and willing to open up. Those who share less may need more time to feel comfortable with the group.

9:45 – 10:15 Overview of Curriculum Goals and Expectations

The facilitator will explain to the group the agenda for the retreat, the curriculum outline and the goals of the training. As well, the facilitator will go over his or her expectations for the course including participation, confidentiality, openness, risk-taking, respect and growth.

Rationale: Group members may be new to this sort of training process, and therefore may be wary of participating. These particular members will be assured that, while it is expected that they will be open with their feelings and participation, they also hear that confidentiality is to be strictly maintained within this group.

Presentation: The facilitator will explain confidentiality and its significance in a group like this. Group members will be asked to sign a confidentiality statement (See APPENDIX E) in order to stress the significance of upholding the group's confidentiality. The facilitator will also sign a confidentiality statement to convey his or her intent to remain confidential with the information shared in the group. The facilitator will discuss the importance of the group members being willing to commit to their own growth and the growth of their co-workers through sharing and being open during the group sessions.

The goals of the curriculum will be presented after expectations of confidentiality, openness and respect have been presented. An outline of the goals and structure of the training is located in APPENDIX F. The facilitator will explain that there are two kinds of openness/growth: 1) the growth of opening yourself up to caring about your own development and that of your employees, and 2) the growth of self which occurs when

one commits to the process of change and possibility within the Eden Alternative. This change has the goals of allowing for more fulfilling lives for elders living in the facility, and will also leading to more fulfilling work for these employees.

Evaluation: Again, the facilitator should note the overall “feel” of the group, as well as individual member’s reactions to the presented information. Note who seems open and who seems more apprehensive. Address participants’ concerns as they arise.

10:15 – 10:30 Break

10:30 - 12:00 History of Personal Growth, Leadership Development and Middle Managers in Culture Change

The facilitator will display a Power Point presentation discussing the philosophies of Kouzes and Posner (2002) and Buckingham and Coffman (1999), and research on the effects of culture change on middle managers of an organization. This presentation will also discuss research investigating the most common reasons employees leave their jobs in nursing homes and how employee personal development improves job performance. This presentation will give background and rationale for how this training is relevant to their work in an Eden Alternative nursing home (see APPENDIX G for an outline of this presentation). An all-group discussion of insights into why the concept of “You Grow First” is so important will follow in light of the information presented.

Rationale: It is important for participants to have information and background as to the theoretical basis for personal growth and leadership in order to be able to relate these concepts to their work within an Eden facility, as well as their personal values/attributes/professional competencies.

Presentation: The presentation (outlined in APPENDIX G) will display some of the highlights of the research performed by Kouzes and Posner (2002), Buckingham and Coffman (1999), and other researchers. The presentation will not display too much detail and will keep the participants engaged in the idea of “You Grow First.” The Power Point

presentation will last approximately 45 minutes. The remaining 45 minutes will be spent discussing how what was presented will apply to participants' new role as managers in an Eden Alternative nursing home.

Evaluation: Note whether participants are recognizing the vital role they play as managers in the workplace health of their employees and the nursing home culture as a whole, and how their personal selves impact this relationship.

12:00 – 1:15 SHARED LUNCH

1:15 – 3:15 New Roles of Managers in an Eden Alternative Nursing Home

Managers will be involved in a discussion related to the vision of their Leadership Group within the Eden Alternative. The facilitator will previously have arranged for members of their Leadership Group, preferably the CEO or Administrator of the nursing home, to discuss with managers during this time what they see as their future role in the nursing home as Eden Alternative managers. This time will also include members of the Leadership Group. It was determined by the Focus Group who reviewed this curriculum that it is important for managers to be welcomed into the Eden Alternative by their immediate supervisors.

Rationale: Managers must have a clear understanding of their new roles. It is important for Leadership to be a part of this understanding process for managers and to welcome managers "with open arms" to the Eden Alternative. It was recommended by the Focus Group that having managers talk directly with their supervisors would allow them to have an open forum to discuss any resistance. As well, Leaders will be expected to be open to hearing about any recent changes they themselves have made as a result of the leadership soil warming, and hopes for change from either party.

Presentation: Members of the Leadership Group are well-versed in the Eden Alternative and know the needs of their organization. During the first hour, Leaders will present their ideas of how the Eden Alternative will affect managers and the roles that

they play within the given facility. At the recommendation of the Focus Group, the second hour of this time will be used for managers to meet with their immediate supervisors (members of the Leadership Group) to have a personal conversation about expectations regarding their new role and any changes that managers may have experienced with their Directors since the Leadership Vote. Managers will most likely have many questions regarding their changing roles and leaders should be prepared to answer questions regarding these changes. Leadership will be coached as to how to deal with resistance by maintaining an open heart and open mind during conversations with managers. The Eden Alternative Staff Ten Principles (see Appendix R) will be briefly introduced to managers by their Directors and will be used as a tool in this conversation. At the recommendation of the Focus Group, this conversation should also include a discussion of strengths and opportunities for growth in relation to the Eden Alternative Ten Principles and the Staff Ten Principles.

Evaluation: Note managers' reaction to changes in their roles. Address any visible concerns of managers and make sure that participants clearly understand expectations of them from their Leadership.

3:15 – 4:15 Defining Leaders/Talents

There are many different definitions of a leader. What one person considers a leader, may not be what another person considers a leader. As well, some people revel in the idea of being referred to as a leader while others may be uncomfortable with that term for many different reasons. As Buckingham and Coffman stated in *First, Break All the Rules* (1999), talents are the richness of the employee. While not every person is a leader, everyone has talents. Managers will investigate their own talents and those of their team.

Rationale: The strength of this exercise is that it relies on self-awareness to help managers become more effective at recognizing their own talents and translating that awareness to members of their work teams.

Presentation: The facilitator will review Buckingham and Coffman (1999) regarding talents. At the recommendation of the Focus Group, this section of the curriculum will also give managers the opportunity to discuss what they consider “leadership.” The following questions should be discussed:

- How do you define “leadership”
- Who do you consider a “leader?”
- Do you consider yourself a leader?
- How does it make you feel when you are referred to as a “leader?” Why?

While not everyone agrees on what constitutes a leader, and whether or not they or the people around them are leaders, everyone has talents. It is the job of a manager to motivate people, or more precisely, to stimulate self-motivation. In order to do this a manager must know what they, themselves, as well as their staff excel at individually. These are called talents.

- Skills, knowledge and talents are three very unique things:
 - Skills are learned competencies, the “how-to” of a job. They can be transferred from one person to another.
 - Knowledge is what you are aware of, often through experience or study. Like skill, knowledge can be taught and learned.
 - A talent, however, is a built-in, recurring theme of personality or behavior.

EXAMPLE: most accountants have learned a lot about bookkeeping, and through practice, have become skillful at arranging numbers, but what really drives most of them is an inherent “need for precision.” That is their talent. Similarly, a skilled nurse may

have a talent for "comforting frightened elders" in the nursing home. She may also know a lot about medicine and nursing, but it is her "comforting" that characterizes who she really is and how she thinks, feels and acts; her talent.

There are three kinds of talents: striving, thinking, and relating:

- Striving talents explain the "why" of a person, the source of someone's energy and ambition. A need to be of service, a desire to be on center stage, or a love of helping others are striving talents.
- Thinking talents explain "how" a person operates, how s/he thinks, makes choices ,and comes to decisions. Thinking strategically, being open to surprises, or calmness under fire are thinking talents.
- Relating talents put people into the equation. They explain "who" you trust, make friends with or avoid. Believing that trust must be earned is a relating talent; so is avoiding confrontation.

Talents are people's characteristic ways of responding to and interacting with the world. They govern how we think and act. Shyness is a filter. So are curiosity, fear, entitlement and respect for authority. Buckingham and Coffman (1999) say someone may know how to do a job, but if their filters are out of sync with the task, the knowledge alone won't produce results. The filters have to be aligned with the task.

Working in teams of two, managers will discuss their talents, identifying three of their recurring patterns of thought, feeling and/or behavior. They will then reflect on this question: "How would I best manage a person like me?" Following, managers will then be asked to think of the talents others bring to their staff and reflect on how those talents could be best managed. A worksheet for this exercise is in available in APPENDIX P.

Evaluation: The facilitator will walk around the room, taking note of people's conversations and what type of talents they are discussing for each category.

4:15 – 4:30 Wrap Up

Rationale: It is important to review each day, giving an overview of what was learned and what is to be expected for the next day.

Presentation: The facilitator reviews the day and briefly describes themes that will be discussed during the next morning. As well, there should be an opportunity to ask/answer any questions. In conclusion, members will participate in a Learning Circle where they are asked to answer the question, “What is one thing you were reminded of about yourself today that you had not thought about in a while? How might it change you even a little bit?”

Evaluation: The facilitator should pay close attention to how members pay attention to the wrap up and by any questions they may have.

Day Two

8:30 – 9:00 Coffee/Welcome Back/Check In

Rationale: Regroup and find out how others are doing.

Presentation: The facilitator will lead the group in a check-in, addressing any questions or concerns that managers may have become aware of over the night.

9:00 – 10:30 Values Clarification: Beginning to define ourselves... in light of Eden

Participants will begin to learn more about what they bring to the nursing home environment every day by virtue of their values and talents.

Rationale: Participants need to know who they are as individuals. They need to understand their values and what it means in light of their position as a manager and their work in an Eden Alternative nursing home. At the recommendation of the Focus Group, the values of the given Eden Alternative nursing home should also be folded into this section during the “work values” exercise.

Presentation: The facilitator will begin by introducing the concept of values of the Eden Alternative by reviewing the original Eden Alternative Ten Principles (see

APPENDIX J). In an effort to begin examining participants' individual values, participants will be asked to each name a person or people they admire. They will be asked to be candid in describing the traits and qualities which are admirable in those people. Managers will then be asked to complete two exercises related to clarifying personal values:

1. Simple Values Clarification Exercise... cultural, personal and work values (see APPENDIX K) Also refer to the individual facility's values (mission and vision statements).
2. Dare to Share... personal stories reflecting values (see APPENDIX L)

The Clarification of Values: Once a belief becomes part of a person's thinking, it drives the individual to act in a highly specific manner. This is a common understanding of the role of values. No one escapes his/her beliefs. Either consciously or unconsciously, values guide personal and professional thinking. Therefore, they have a powerful influence on how we think. There are inconsistencies between individuals that are a result of their personal value system – we are unique. While we all might experience the same situations/stimuli, we never experience them the same way. As individuals, we never have the same experience of a single shared event. Values clarification is about acknowledging that individuals have different values and, therefore, are likely to make different decisions about the same topic. The end result is that we, as professionals, can come to terms with their different values and actions. This is why professional trainings like this are so important, since they encourage and allow for professional interactions to discuss and assess values.

3. After completing the values clarification exercises, participants will close by discussing the following quotes:

- "Ordinarily, everything we do is in our self-interest. Everything." -- Anthony de Mello

- “You see what you look for and you look for what you know.” – Bill Thomas

The point of the quotes is to gain the understanding that people do not operate outside of their values, and that values can restrict our thinking. The managers' roles are to begin to see others as having as much valid input as they have. Everyone is closed-minded to some extent. Managers opening themselves up to the diversity of thought and experience in their staff and in the elders will create more opportunity for growth of the Eden organization.

4. Review the original Eden Alternative Ten Principles (APPENDIX J) as a group. Reflect on each principle and how that Eden value is respected in the groups' nursing home.

- Do they currently believe that each of the Ten Principles are valued in their nursing home?
- On their floor?
- In their own work with elders?

Remember that at this point in the nursing home's Eden journey, it is highly likely that the home won't be far along with implementing the principles so there may be a limit to what principles are reflected in the home at present. It is the responsibility of the facilitator to make sure that this discussion isn't overly negative or discouraging, but rather, focuses on strengths with positive recommendations for areas for improvement.

Evaluation: The facilitator should be aware of how participants are reacting to this discussion and whether people seem willing to contribute. Note whether people are discussing their own motivations and experiences. Finally, assess the level of comfort among the group.

10:30 – 10:45 Break

10:45 – 12:00 What is my type?

Participants will have the opportunity to take an adapted version of the Keirsey Temperament Sorter (See APPENDIX H) found at www.humanmetrics.com. This test is based on the Jungian - Myers-Briggs typological approach to personality. After taking the assessment, participants will learn about themselves from the descriptions provided.

Rationale: Learning one's type is a unique perspective into the self. Participants can have fun but also begin to think about themselves, analyzing what traits are prominent in their type description. It is important to note that this test is meant to be used for fun. It should be explained by the facilitator that:

- this tool is designed to increase self-knowledge and self-discovery; in no way is this test a measure of mental wellness or a substitute for therapy
- this tool is a personality inventory that should be viewed as non-judgmental
- all personality types are valuable; no type is healthier or more desirable
- type preferences are tendencies and inclinations, not absolutes
- respect for all people and their approach is implicit; valuing human differences

Presentation: The facilitator will ask participants how many of them have taken a type test prior to this session. Some participants may have experience with either the Myers-Briggs Type Indicator (MBTI) or another test like the MBTI. Participants will be directed to computers in which they can take the Type Test located at www.humanmetrics.com. If multiple computers are not available, the facilitator can either send the link to the website to participants in advance of the session and ask them to bring their results to this meeting or, if only one computer is available, participants can

use a paper copy of the test and, with coordination, results can be tabulated by the facilitator in as little as ten minutes (see APPENDIX H).

Upon completion of the test, participants will have time to read through the description of their type. Types are expressed in a four-letter combination representing the following traits...

Invert OR **E**xvert

Sensing OR **I**ntuitive

Thinking OR **F**eeling

Judging OR **P**erceiving

For example: ENFP or INTJ

After participants have finished taking the test, the facilitator distributes descriptions of each manager's given personality type. (See APPENDIX I for the 16 type descriptions).

Following the type descriptions, the facilitator should lead a group discussion asking participants to volunteer their thoughts on the results of their typology test, generating discussion among the group:

- Is anything different in their descriptions than they anticipated?
- Did they learn anything about themselves or another member of the group?
- Is there anything they feel does not agree with their view of themselves in their description? What about their type might indicate what drew them into eldercare?
- How does their type relate to how they do their work?
- How does their type help them to make elders' lives more comfortable?

Evaluation: The facilitator should pay close attention to how participants react to going through the type test. Do they seem enthusiastic about learning more about themselves? Are they reluctant to discuss the things they learn about themselves

through this activity? Any concerns should be addressed throughout the process. The facilitator should reinforce the idea that the first step to anything positive is self acceptance. Participants will need to keep their test results in the binder provided, as they will be used later in the training.

12:00 – 1:15 Shared Lunch

1:15 – 1:45 Role Play – Stereotypical Personalities

Rationale: This is a fun role play, set in the context of a group session in which participants will be able to see how roles exist within a group. The translation can be made to the nursing home via realization that members of groups often function in roles, those they perpetuate themselves and those that others assign to them.

Presentation: Participants will partake in a lighthearted role-play in which members of the group will be assigned various “stereotypical” and “characteristic” roles (see APPENDIX M). After participants have read all descriptions of the roles, they will be asked to ad-lib based on the role that they play within the skit. There may have to be two people assigned to each role. At the end, members will be asked to assess how the group functioned given their roles. Discuss. This activity, again, should be humorous and fun.

1:45 – 2:00 The Five Stages of Group Development

Rationale: As members of the management team move closer to the neighborhood teams approach and utilize the talents of their own staff, it is important to recognize the stages of group development and how they may present themselves in neighborhood teams. A work team is a group. Therefore, it is necessary to take a look at how these dynamics might play themselves out in the workplace.

Presentation: Though we belong to many different groups, each one is different, due to a variety of factors: 1) size of the group; 2) how long the group has been together; 3) the combination of personalities in the group; 4) ones role within the group; 5)

voluntary vs. required participation; and 6) demographics of the group members (age, sex, skill levels, attitudes, etc).

Managers will review the handout on the five stages of group development (see APPENDIX O). While reviewing the materials, encourage participants to discuss various times when groups they have been a part of have gone through one of the stages. In conclusion, make the recommendation to the group that one excellent way to help this process is through journaling – keeping an ongoing record of the group’s journey, so that at any stage of the process, managers can look back and see 1) how far they’ve come; 2) what they have accomplished; 3) how they solved problems along the way; and 4) what lessons have they learned to take to future groups.

Remind the group that even though this group is functioning as an Eden Alternative managers learning group, all of these principles will be even more important for them to consider with the groups they work with, as well as the other committees on which they may serve throughout the nursing home. Thinking about the stages of groups, have participants reflect on their own experiences with different groups. Can anyone share an experience they have had with a group that worked very well together? Tell the group what worked well with that group, and why they think they were so successful. Compile a list of the qualities that helped these groups succeed.

Evaluation: The facilitator should be aware of how participants are reacting to this discussion and whether people seem willing to contribute. Note whether people are discussing their own group experiences and understand the stages of group development.

2:00 – 3:30 Group Dynamics According to Type

Participants will learn what it means to function as a group and how those who are in their group are affected by their strengths and compensate for their weaker areas.

Rationale: The success of this training depends upon the participation and reciprocity of group members. Participants will be encouraged to take responsibility for their membership in the group by learning about how their personality interacts with others' personalities. They will be encouraged to see, in relation to Eden, how they are not "all-knowing" in the sense that there are many other contributions to be made by the other people around them. Each individual has their own talents; this activity will allow managers to see how other people in the group have talents unique to their own personality style, and that this knowledge can be translated to their staff dynamics as well.

Presentation: The facilitator will explain the uniqueness of the group given each participant's personality and what they bring to the group in terms of their personality make up, their paradigms and their experiences. Using the Type results from the morning session, the facilitator will present a document entitled "Appreciating Differences Through Type" in the curriculum (see APPENDIX N). The participants will be asked to look at themselves as a group. Given the grid, members place themselves as an "X" in the grid (use an overhead projector or a flip chart of paper for this task). This will create a visual representation of what personalities or types are represented by this group. Members will be asked to share their personality type with one another by deciphering what in their description they may feel agrees with them and what doesn't. From there, the group will have to assess how they feel they will function as a group based on their representation in the type grid. A discussion will ensue addressing the following topics:

- Do they have a good representation of all different types or do they all represent the same types?
- What personalities are they missing – leaving "holes"?

- What types are represented multiple times? What consequences will this have?
- Where might they have to work harder to substantiate what they are naturally missing in this grid?
- How can they determine how they might work well together?
- What will the group's strengths be as a result of their personality make-up?

Participants should then develop a list of concrete things (work-related tasks, ideas) that are strengths of group members, creating a go-to sheet for future reference. (i.e. Susan is good at developing organizational flow charts whereas John is good at determining how best to approach an employee concerning a situation). If participants are having a difficult time, the facilitator may consider using index cards with specific work-related tasks on them. The participants can then translate those cards into a list of who does what best.

Evaluation: The facilitator should be aware of participant's interactions. Are members invested in the group process, willing to share openly with one another and taking risks? In conclusion, ask the group to honestly evaluate their own process.

3:00 – 4:15 Lookers and Runners

Rationale: This activity associates managers with the idea of changing mindsets and assumptions which they will need to learn to do in order to start moving decision making closer to elders and the direct care staff.

Presentation: See APPENDIX Q for directions.

Evaluation: Evaluate whether managers are able to make the connection from the game to the workplace. Can managers understand how assumptions get in the way of progress?

4:15 – 4:30 Wrap Up

Rationale: It is important to review each day, giving an overview of what was learned and what is to be expected for the next day.

Presentation: The facilitator reviews the day and briefly describes themes that will be discussed during the next morning. As well, there should be an opportunity to ask/answer any questions. In conclusion, members will participate in a Learning Circle where they are asked to answer the question, “What is the letter grouping *opposite* of the type I represent? How can I use that description to enhance that side of myself a little more?”

Evaluation: The facilitator should pay close attention to how members pay attention to the wrap up and by any questions they may have.

DAY THREE

8:30 – 9:00 Coffee/Welcome back/Check In

Rationale: Regroup and find out how others are doing.

Presentation: The facilitator will lead the group in a check-in, addressing any questions or concerns that managers may have become aware of over the night.

9:00 – 10:00 Beginning to define ourselves... in light of Eden.

The principles of the Eden Alternative are very versatile. They have been converted to become applicable to employees of a nursing home.

Presentation: The facilitator will go over the Eden Alternative Ten Principles for Staff (see APPENDIX R). While participants are already familiar with them from their conversations with their Directors, they will reflect on what each of the principles mean to them:

- Which of the ten principles stands out for them and why?
- Which is does the nursing home need to work on the most?

- Which do they themselves need to work on the most in their own department?
- How might they become more present in their workplace?

Evaluation: The facilitator should be aware of how participants are reacting to this discussion and whether people seem willing to contribute. Note whether people are discussing their own personal feelings toward the ten principles. Do they understand how those principles are reflected (or not reflected) in the community they work in?

10:00 – 11:00 Active Listening

Participants will learn to practice active listening and reflection in their communication.

Rationale: Active listening and reflection are core concepts in effective communication. As well, they are intimately connected with the concepts and principles of the Eden Alternative. In effect, management is a form of counseling at times. Since active listening, including reflection and empathy, are standards in counseling, it is important for managers to realize the importance of these tools and to practice using them effectively.

Presentation: The facilitator will ask participants to give examples of how they know when someone is listening to them. What verbal and non-verbal cues do they receive when someone is actively listening? What verbal and non-verbal cues do they receive when someone is acting as if they're listening but perhaps is not? After a discussion of the basics of active listening which includes empathy and reflection, participants will practice this concept. A role play will occur (see APPENDIX S). Participants will be asked to evaluate their feelings as both listener and talker. As the talker, what did it feel like to really be listened to? What did it feel like to not be listened to? As the listener, how much did they really feel connected to the talker while not listening vs. while actively listening?

Evaluation: Note whether participants are connecting the active listening process with the vital role they play as managers.

11:00 – 12:15 SHARED BRUNCH

12:00 – 3:15 Test of Integrity – Matching!

Participants will have the opportunity to engage in a question/topic based discussion about Matching. Matching is the ability to be the same person on the inside and at home, as you are to the outside world and at your place of work. In other words, matching is combining your inner world with your outer world.

Rationale: This section of the curriculum should be conducted in an open format. The time allotment has been increased due to the recommendation of members of the Focus Group. Participants need to discuss and learn from one another when and if they are true to their integrity. Are they the same person at work that they are at home? When are they? When aren't they? How will this affect the relationships they have with their staff? Self-knowledge like this will allow participants to return to their work with an awareness of their true selves and allow them to be more genuine while on the job. At the suggestion of the focus group, the questions for this segment (located in Appendix T) have been altered to make them more succinct. It was felt that the questions needed to ask for specific examples of how managers have or will act with integrity in order to stop people from saying "oh, yeah, I do that..." when perhaps they do not.

Presentation: Help participants understand the following outline and have a conversation regarding thoughts around these three dimensions of integrity:

- Inner World / Outer World
 - feelings and thoughts / expression & behavior
- Supervisor / Supervisee
 - when I manage / when I'm with my boss

- Everyday Self / Work Self
 - who I am in my personal life / who I am at work

Following, this conversation, questions (located in APPENDIX T) will be discussed as a group. The questions in Appendix V should be divided into sections of contemplation followed by discussion, in the form of a learning circle. Participants will be asked to share their responses. By now, the group should be “warm” enough that they can feel comfortable sharing this information among the group. It is recommended that some structured learning circles take place at the facilitator’s discretion. Some possible questions include: Can participants tell/feel/know when they are or are not acting with integrity? Have participants give examples of times they have experienced others’ acting with or without integrity. How did it affect them? The facilitator will use bring a flip chart and some markers in order to write down any key words, phrases or ideas to come back and revisit. The following learning points will be emphasized/discussed:

- People have different personalities and look at problems differently
- The way a group of people perform can be affected by personalities within the group that need to be appreciated and respected.
- When a group can embrace their diversity and share in decision-making, they can outperform individuals and lead to more satisfaction for everyone
- Shared values and the needs of elders are more important in decision making than who actually makes the decisions.
- Employees perform best and are happiest when their input is valued and welcomed.
- As a manager, one is a mentor. A manager’s role is to provide resources and support to employees to release the talents inside them.
- Being a manager involves presenting a credible “face” to employees

Evaluation: Note whether participants are sharing openly and taking risks in the information they share. Pay attention to whether they are able to speak openly about fears and worries, about their new roles within the Eden Alternative.

3:15 – 4:30 Wrap Up and Termination

Participants will review what they have learned from this curriculum and will have the opportunity to say goodbye to the group in an effective manner.

Rationale: This curriculum has occurred in a group setting where personal information was shared and relationships were formed or strengthened. It is important for the group to acknowledge their relationships to one another and the things they have learned from each other, as well as to leave the group with an appropriate goodbye through termination.

Presentation: Each participant will be asked to reflect back on the training. At the suggestion of a Focus Group participant, the learning circle question upon termination of the training will be: What is one thing you got out of this You Grow First training experience: a “gem” to take with you or a highlight of the training?” As well, in anticipation of termination, the facilitator should remember to do the following:

- Reinforce the progress that was made during the course of the group.
- Offer suggestions to group members about ways in which they can successfully incorporate what they have learned into their daily work.
- Help group participants brainstorm and anticipate problems that may arise when the group has concluded.
- Allow time for constructive feedback from group members. This includes feedback for the leader as well as feedback for other group members.
- Assist participants in processing their feelings about termination and helping them resolve any unfinished business.

- Educate participants about additional resources that are available to them as supports once the training has ended.
- Make oneself available if the need for consultation with group members arises.

Evaluation: Members will fill out an evaluation of the training. See APPENDIX U.

Conclusion

The preceding curriculum was developed from the need for managers of Eden Alternative nursing homes to be included in, and have responsibility for, their role in the culture change process. Culture is composed of behavioral norms which members of an organization follow as they perform their work. These norms are influenced by the behaviors the leaders of the organization model. Therefore, the current curriculum helps managers to assist in cultural transformation by setting the expectation that managers are capable of identifying, exhibiting, reinforcing and modeling behaviors and attitudes which are essential to the desired culture of an Eden Alternative nursing home (Barriere, Absib, Ordning, & Rogers, 2002).

The unique position of managers in an organization makes this type of curriculum crucial to the development and success of an organization's culture change initiative. Roscow (1989) makes the case that managers must relate on three levels: they relate upward to their boss as subordinates, they relate downward to their team as supervisors, and they relate laterally to co-workers in cooperative efforts. The demand of the manager's position can be stressful in an already stressful workplace. After years of command-and-control culture in a traditional nursing home setting, it is likely that managers become skilled at having to relate in this tri-level fashion and therefore may have become mechanical in their nature. It may take considerable effort to undo the habits embedded in the once traditional hierarchical structure but newly reformed Eden Alternative nursing home. The current curriculum is designed to facilitate this process by:

1) giving the managers a chance to have a conversation with leadership about changing that role; and 2) giving managers the tools to begin redefining that role for themselves.

Lacking genuine bonds between managers and employees, any new initiative, no matter how well intentioned, will be greeted with suspicion and culture change cannot be successful (Buckingham & Coffman, 1999). Similarly, a lack of genuine bonds is a major reason why people leave positions – turnover within any organization is most often linked to managers, not to companies, pay, benefits or organizational strategies (Buckingham & Coffman, 1999). The current curriculum is devised to enhance the bonds between managers, consequently enhancing their relationships with their staff.

The current curriculum heeds Roscow's (1989) warnings that many times managers are taken for granted as being "on board" with whatever initiative is recommended by leaders, and empowerment of direct care staff begins. This training allows managers to become part of the culture change initiative and hopefully thwart the many negative repercussions of failing to train managers (Roscow, 1989) by recognizing and validating the unique and valuable roles that they play in the culture change process known as the Eden Alternative. Managers are the liaisons and coaches for organizational change. They are the key to transformation. Without true commitment and integrity from managers, the Eden Alternative cannot successfully be implemented. The conversation between managers and their director supervisors in Day One of the training will encourage managers to recognize the importance of the role that they play within the new Eden Alternative culture.

Specifically, the importance of the current curriculum lies in the tools and exercises it employs. These tools and exercises were selected to help managers in the self-development process, embodying Fox's (2005) practice pathway: You Grow First. Management effectiveness and personal development are linked in many ways (Bourner, 1996), and leaders who are engaged in their own self-development also tend

to be effective at developing others (Zenger & Folkman, 2004). As well, if managers have an improved understanding of what motivates them, it will provide a better understanding of what motivates others as well, translating to more realistic expectations of colleagues and enabling a manager to listen more empathetically (Lindenfield, 1995). The retreat itself gives managers the opportunity to stop, take notice of their own values, habits and personality styles, recognize that each individual has many unique talents in which to bring to the nursing home environment, and translate this awareness into their management style. Creating more intimate relationships between staff also creates a support network in which caregivers receive support for the physically, mentally and emotionally demanding work of nursing home care. Exercises included in the curriculum encourage reflection on personality styles, values, individual views of leadership and how those variables effect affect the people a manager works with.

The basis for the tools and exercises used in this curriculum was, at their core, to improve the qualities of trust, integrity and honesty among staff, qualities upon which relationships are founded (Zenger & Folkman, 2004). It is also a hope of the current researcher that managers will then take some of the tools in this curriculum and use them with their own staff, creating a trickle-down situation concerning personal growth which eventually will have it's affect on residents by improving relationships with caregivers. A nursing home is a HOME. A home is not a corporate environment; it is a place to feel safe and secure, respected and loved. Lindenfield (1995) indicated that self-improvement improves the likelihood that organizations can transform into more ethical, caring, sharing communities. The current curriculum is a way to help build a stronger Eden Alternative nursing home by teaching managers to recognize what every individual has to offer - the talents of themselves and their staff - helping individuals become more of who they are so that they can lead with their hearts (Kouzes & Posner, 1999).

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APPENDICES

APPENDIX A

Eden Alternative Implementation Pathway

Vision Stage

1. 8 Hour Leadership Team Training
2. Leadership Vote
3. Create Mission and Vision Statement
4. Administrator Trained as Certified Eden Associate
5. (Eden Registration may take place after this commitment is made)
6. Warm the Soil
7. Create a Timeline
8. Create Teams on Paper (only)

Education and Planning Stage

1. Basic Eden Education presented by an Eden Associate
2. Process Education begins and “families” and Planning Committees are assembled
3. Leadership Team Begins Education of Principle One
4. Introduction of plants, animals and children with residents steering these decisions

APPENDIX B

The Eden Alternative Pathway Practices

1. Wake Up and See the World Differently!
2. You Grow First
3. Circle the Wagons
4. Open Hearts Open Minds
5. Let the Lighthouse be your Guide!
6. You Can't Quarterback from the Stands!
7. Expect the Best!
8. Elders Rule!
9. Think Like an Organic Gardner
10. Look for the Shiny!

Credited to: Nancy Fox, Executive Director, Eden Alternative

APPENDIX C

The Toilet Paper Icebreaker

Pass a roll of toilet paper around to each person and tell all those playing to take however much they want. Once every person has taken the number of sheets they want, each has to tell one thing about themselves for every sheet they have in their hand.

APPENDIX D

BINGO Icebreaker

Create a bingo card grid from a sheet of paper, dividing it into a grid of 12 or 16 fairly large squares using a thick pen/pencil and a ruler. In some of the squares write a phrase such as "Has climbed a mountain", "Rides a bike", "Has run a marathon", "Works for a charity", etc. (things that it would be interesting to know about someone). The number of squares you fill in is up to you but the more you create the more time it'll take to complete. Blank out all remaining squares by coloring them in and then photocopy enough copies so that everybody who'll be there can have one.

At the start of the session/meeting give each person a copy and tell them to find one person who has done each thing. (i.e. ask the other players whether they have climbed a mountain). If the player being asked has done that activity they sign their name to that box. Players can only sign one square before moving on (but they can meet the person again later and ask another question).

Keep going until someone has all of the boxes filled in and yells "BINGO!" Have the winner begin by introducing themselves and then they can read off each of their winning squares... whoever's name is in that square must then introduce themselves... and so on... until everyone has been introduced to the room.

APPENDIX E

Confidentiality Statement

Confidentiality means that what we, the group facilitator and all of the group members, do not discuss with others outside of this group what goes on during our meetings. What we say here is private and not to be shared with the world – either in our personal lives or at work. Knowing that what is said in this group will not be shared, makes opening up to strangers and co-workers safer in this environment. In order to assure as much possible that our private information will stay that way, we all need to agree that we will respect one another's confidentiality.

I, _____, understand what confidentiality is by definition, and understand what it means to me, the facilitator and the members of the group. I will respect confidentiality by not sharing anyone's private information with those outside of this group. In return, I expect the same from the group facilitator and the other members of the group.

(Signed)

(Date)

APPENDIX F

Outline of Curriculum Goals and Structure

Curriculum Goals

- Provide the opportunity for increased self-knowledge for all members of the training
- Provide a clear understanding of the changing role of managers within an Eden Alternative nursing home
- Provide insight into how one's values, beliefs, constructs and experiences affect one's role as a manager as part of an Eden Alternative nursing home
- Provide insight as to how personalities affect group performance and how to be responsible for creating cohesiveness among work teams
- Provide practical tools that are directly related to the changing role of a manager in an Eden Alternative nursing home from command-and-control approach to a collaborative, shared decision-making approach

Day One: A look at Eden! What do I bring with me?

- Confidentiality
- Goals of Curriculum
- Personal Growth, Leadership Development & Managers in Culture Change
- Lunch
- New "role" as a manager in an Eden Alternative nursing home
- Defining Leaders/Talents Exercises
- Wrap up for the day @ 4:30

Day Two: Types and Group Dynamics

- What is my type? Typology Test
- Values clarification... Who am I?
- Lunch
- Role Play: Stereotypes
- Five Stages of Group Development
- Group Dynamics according to Type
- Exercise in Groups – Lookers and Runners
- Wrap up @ 4:30

Day Three: Beginning to define ourselves... in light of Eden

- Staff Ten Principles
- Active Listening Skills
- Role Play: Active listening
- Conversation on Integrity – Matching
- Reflection on Training/Termination of Group
- Evaluation

Questions and Comments...

APPENDIX G

Outline of Research on Leadership, Personal Growth and Managers

Research on Leadership Theory: Two Models

Kouzes and Posner: *The Leadership Challenge* (2002)

- What values (personal traits) do you look for in a leader?
- Honest, Forward Looking, Competent, Inspiring
- CREDIBILITY is the foundation for leadership!
- “Honest” and “Inspiring”
- Character and Integrity
- Tied to values and ethics
- Fueled by attitude, beliefs and emotions

Buckingham and Coffman: *First Break All the Rules: What the world's greatest managers do differently.* (1999)

- Not everyone is a leader; not everyone is a manager.
- People need great managers more than anything else!
- Everyone has talent and great managers tap into each person's talents and help them to apply them productively.
- The best way to build a strong organization is to help individuals become more of who they are because ultimately, people don't really change; they need to be accepted for who they are as individuals.

What do Buckingham and Coffman Say About Relationships?

- Lacking genuine bonds between manager and employee, any new initiative, no matter how well intended will be greeted with suspicion.
- There is a definitive link between employee opinion (satisfaction) and business performance.
- The manager – not pay, benefits, perks or a charismatic corporate leader – was the critical player in building a strong workplace. The manager was the key!
- Turnover is most often linked to managers - people leave managers, not companies.
- Research on Individual Growth and Job Performance

Bourner (1996)

- Management effectiveness and personal development are linked in the following ways:
- Clarifying values and personal aims (knowing how you prefer to behave and how you prefer to be)
- Explaining your comfort zone (expanding your boundaries)
- Recognizing profound knowledge (seeking wisdom)
- Reflecting, articulating and acting (telling and retelling your story)
- Behaving with integrity (maintaining integrity)
- Learning to be (acceptance of self)
- Accepting responsibility (taking responsibility for the world you're creating)
- Seeking wholeness: mind, body and spirit (finding wholeness and balance)

- Expanding from the inside outwards (bringing out what's in you)
- Lindenfield (1995)
- If we understand what motivates us, it will provide understanding of what motivates others as well.
- This translates to more realistic expectations of colleagues and enables a manager to listen more empathetically.

Zenger and Folkman (2004)

- Leaders who are very engaged in their own self-development tend also to be very effective at developing others.
- Managers should have a development plan for themselves so that they can then translate their own growth to that of their staff.
- The basis for this personal development should be the recognition that trust (credibility, honesty) is the one quality upon which all relationships are founded.
- The Importance of Managers in Culture Change Managers and Culture Change
- Culture is composed of behavioral norms that members of an organization follow as they perform their work.
- These norms are influenced by the behaviors organizational leaders model and reinforce. Consequently, bringing about cultural transformation requires that leaders are capable of exhibiting and reinforcing behaviors that are essential to the desired culture.
- Many managers are not trained to manage change, an anxiety producing thing for staff, as well as for managers themselves (Barriere, Absib, Ording, & Rogers, 2002).

The unique position of managers

- Middle managers must act as in three roles:
 - they relate upward to their bosses as subordinates
 - they relate downward to teams as supervisors
 - they relate laterally to peers in the organization as equals in cooperative efforts.
- Managing on three levels is very demanding, Roscow (1989) equates it to a baseball player having to excel simultaneously in hitting, fielding, and pitching.
- The middle manager must be able not only to manage all three relationships, but also to shift quickly and frequently from one to another.

Don't Forget to Include Managers in the Process

- Roscow (1989) managers are often taken for granted during the culture change process and at times are neither consulted nor involved until it is too late to consider their opinions.
- A great effort is likely to be expended on employee training and new forms of employee communication, but very little on supervisors. This, as a result, creates a self-fulfilling prophecy: Supervisors are perceived as traditionalists, resistant to change, and threatened by innovations. Upper-level management bypasses managers, giving more and more autonomy and power to self-directed teams and thereby almost guaranteeing that managers will, in fact, resist.

Potential Consequences of Culture Change on Supervisors

- a potential increase in work load and overextended span of control
- perceived threats to their careers and to employment due to reduction in the layers of management

- perceived threats due to enhanced power and participation of direct caregivers
- radical changes in work rules (at times without their participation)
- little or no training to prepare them for their new relationships with workers
- no perceived recognition or reward: rather a sense of loss of power, security
- inadequate training in the new managerial style
- the necessity of supporting a team system which they may not consider an added value to the organization

THE BOTTOM LINE

A Nursing Home is a HOME. A home is not a corporate environment; it is a place to feel safe and secure, respected and loved. Research (Lindenfield, 1995) indicates that self-improvement improves the likelihood that organizations can transform into more ethical, caring, sharing communities. Great Managers are the one thing which can most affect this link - they control the environment in a most crucial way. Therefore, given that we know that the people need great managers more than anything, and the fact that staff respect leaders who are - among other things - honest and inspiring... managers must investigate their own values, ethics, attitudes and beliefs in order to develop the self awareness necessary to be a more effective manager.

Questions and Comments

APPENDIX H

Humanmetrics Typology Test

As a rule, current preoccupations worry you more than your future plans

YES NO

You find it difficult to talk about your feelings

YES NO

You feel at ease in a crowd

YES NO

You do your best to complete a task on time

YES NO

You are strongly touched by the stories about people's troubles

YES NO

You are more interested in a general idea than in the details of its realization

YES NO

Strict observance of the established rules is likely to prevent a good outcome

YES NO

Often you prefer to read a book than go to a party

YES NO

You tend to rely on your experience rather than on theoretical alternatives

YES NO

It's difficult to get you excited

YES NO

You rapidly get involved in social life at a new workplace

YES NO

It is in your nature to assume responsibility

YES NO

You frequently and easily express your feelings and emotions

YES NO

You often think about humankind and its destiny

YES NO

You believe the best decision is one that can be easily changed

YES NO

You are a person somewhat reserved and distant in communication

YES NO

You prefer to act immediately rather than speculate about various options

YES NO

You trust reason rather than feelings

YES NO

You spend your leisure time actively socializing with a group of people, attending parties, shopping, etc.

YES NO

You usually plan your actions in advance

YES NO

Your actions are frequently influenced by emotions

YES NO

You often contemplate about the complexity of life

YES NO

You often do jobs in a hurry

YES NO

You find it difficult to speak loudly

YES NO

You get bored if you have to read theoretical books

YES NO

You value justice higher than mercy

YES NO

The more people with whom you speak, the better you feel

YES NO

You like to keep a check on how things are progressing

YES NO

You easily empathize with the concerns of other people

YES NO

You are more inclined to experiment than to follow familiar approaches

YES NO

You avoid being bound by obligations

YES NO

You prefer to isolate yourself from outside noises

YES NO

It's essential for you to try things with your own hands

YES NO

You think that almost everything can be analyzed

YES NO

You are usually the first to react to a sudden event: the telephone ringing or unexpected question

YES NO

You take pleasure in putting things in order

YES NO

You feel involved when watching TV soaps

YES NO

You easily understand new theoretical principles

YES NO

The process of searching for solution is more important to you than the solution itself

YES NO

You usually place yourself nearer to the side than in the center of the room

YES NO

When solving a problem you would rather follow a familiar approach than seek a new one

YES NO

You try to stand firmly by your principles

YES NO

It is easy for you to communicate in social situations

YES NO

You are consistent in your habits

YES NO

You willingly involve yourself in matters which engage your sympathies

YES NO

You easily perceive various ways in which events could develop

YES NO

A thirst for adventure is close to your heart

YES NO

You prefer meeting in small groups to interaction with lots of people

YES NO

When considering a situation you pay more attention to the current situation and less to a possible sequence of events

YES NO

You consider the scientific approach to be the best

YES NO

You enjoy having a wide circle of acquaintances

YES NO

You are almost never late for your appointments

YES NO

You readily help people while asking nothing in return

YES NO

You often spend time thinking of how things could be improved

YES NO

Your decisions are based more on the feelings of a moment than on the careful planning

YES NO

You prefer to spend your leisure time alone or relaxing in a tranquil family atmosphere

YES NO

You feel more comfortable sticking to conventional ways

YES NO

Objective criticism is always useful in any activity

YES NO

You enjoy being at the center of events in which other people are directly involved

YES NO

You know how to put every minute of your time to good purpose

YES NO

You are easily affected by strong emotions

YES NO

You are always looking for opportunities

YES NO

Deadlines seem to you to be of relative, rather than absolute, importance

YES NO

After prolonged socializing you feel you need to get away and be alone

YES NO

Your desk, workbench etc. is usually neat and orderly

YES NO

You tend to be unbiased even if this might endanger your good relations with people

YES NO

You like to be engaged in an active and fast-paced job

YES NO

You have good control over your desires and temptations

YES NO

You tend to sympathize with other people

YES NO

You easily see the general principle behind specific occurrences

YES NO

You are inclined to rely more on improvisation than on careful planning

YES NO

You get pleasure from solitary walks

- YES NO

(Taken, with written permission, from <http://www.humanmetrics.com/cgi-win/JTypes2.asp>)

APPENDIX I

Personality Type Descriptions

ISTJ: The Duty Fulfiller

As an ISTJ, your primary mode of living is focused internally, where you take things in via your five senses in a literal, concrete fashion. Your secondary mode is external, where you deal with things rationally and logically.

ISTJs are quiet and reserved individuals who are interested in security and peaceful living. They have a strongly-felt internal sense of duty, which lends them a serious air and the motivation to follow through on tasks. Organized and methodical in their approach, they can generally succeed at any task which they undertake.

ISTJs are very loyal, faithful, and dependable. They place great importance on honesty and integrity. They are "good citizens" who can be depended on to do the right thing for their families and communities. While they generally take things very seriously, they also usually have an offbeat sense of humor and can be a lot of fun - especially at family or work-related gatherings.

ISTJs tend to believe in laws and traditions, and expect the same from others. They're not comfortable with breaking laws or going against the rules. If they are able to see a good reason for stepping outside of the established mode of doing things, the ISTJ will support that effort. However, ISTJs more often tend to believe that things should be done according to procedures and plans. If an ISTJ has not developed their Intuitive side sufficiently, they may become overly obsessed with structure, and insist on doing everything "by the book".

The ISTJ is extremely dependable on following through with things which he or she has promised. For this reason, they sometimes get more and more work piled on them. Because the ISTJ has such a strong sense of duty, they may have a difficult time saying "no" when they are given more work than they can reasonably handle. For this reason, the ISTJ often works long hours, and may be unwittingly taken advantage of.

The ISTJ will work for long periods of time and put tremendous amounts of energy into doing any task which they see as important to fulfilling a goal. However, they will resist putting energy into things which don't make sense to them, or for which they can't see a practical application. They prefer to work alone, but work well in teams when the situation demands it. They like to be accountable for their actions, and enjoy being in positions of authority. The ISTJ has little use for theory or abstract thinking, unless the practical application is clear.

ISTJs have tremendous respect for facts. They hold a tremendous store of facts within themselves, which they have gathered through their Sensing preference. They may have difficulty understanding a theory or idea which is different from their own perspective. However, if they are shown the importance or relevance of the idea to someone who they respect or care about, the idea becomes a fact, which the ISTJ will internalize and

support. Once the ISTJ supports a cause or idea, he or she will stop at no lengths to ensure that they are doing their duty of giving support where support is needed. The ISTJ is not naturally in tune with their own feelings and the feelings of others. They may have difficulty picking up on emotional needs immediately, as they are presented. Being perfectionists themselves, they have a tendency to take other people's efforts for granted, like they take their own efforts for granted. They need to remember to pat people on the back once in a while.

ISTJs are likely to be uncomfortable expressing affection and emotion to others. However, their strong sense of duty and the ability to see what needs to be done in any situation usually allows them to overcome their natural reservations, and they are usually quite supporting and caring individuals with the people that they love. Once the ISTJ realizes the emotional needs of those who are close to them, they put forth effort to meet those needs.

The ISTJ is extremely faithful and loyal. Traditional and family-minded, they will put forth great amounts of effort at making their homes and families running smoothly. They are responsible parents, taking their parenting roles seriously. They are usually good and generous providers to their families. They care deeply about those close to them, although they usually are not comfortable with expressing their love. The ISTJ is likely to express their affection through actions, rather than through words.

ISTJs have an excellent ability to take any task and define it, organize it, plan it, and implement it through to completion. They are very hard workers, who do not allow obstacles to get in the way of performing their duties. They do not usually give themselves enough credit for their achievements, seeing their accomplishments simply as the natural fulfillment of their obligations.

ISTJs usually have a great sense of space and function, and artistic appreciation. Their homes are likely to be tastefully furnished and immaculately maintained. They are acutely aware of their senses, and want to be in surroundings which fit their need for structure, order, and beauty.

Under stress, ISTJs may fall into "catastrophe mode", where they see nothing but all of the possibilities of what could go wrong. They will berate themselves for things which they should have done differently, or duties which they failed to perform. They will lose their ability to see things calmly and reasonably, and will depress themselves with their visions of doom.

In general, the ISTJ has a tremendous amount of potential. Capable, logical, reasonable, and effective individuals with a deeply driven desire to promote security and peaceful living, the ISTJ has what it takes to be highly effective at achieving their chosen goals - whatever they may be.

ISTP: The Mechanic

As an ISTP, your primary mode of living is focused internally, where you deal with things rationally and logically. Your secondary mode is external, where you take things in via your five senses in a literal, concrete fashion.

ISTPs have a compelling drive to understand the way things work. They're good at logical analysis, and like to use it on practical concerns. They typically have strong powers of reasoning, although they're not interested in theories or concepts unless they can see a practical application. They like to take things apart and see the way they work.

ISTPs have an adventuresome spirit. They are attracted to motorcycles, airplanes, sky diving, surfing, etc. They thrive on action, and are usually fearless. ISTPs are fiercely independent, needing to have the space to make their own decisions about their next step. They do not believe in or follow rules and regulations, as this would prohibit their ability to "do their own thing". Their sense of adventure and desire for constant action makes ISTPs prone to becoming bored rather quickly.

ISTPs are loyal to their causes and beliefs, and are firm believers that people should be treated with equity and fairness. Although they do not respect the rules of the "System", they follow their own rules and guidelines for behavior faithfully. They will not take part in something which violates their personal laws. ISTPs are extremely loyal and faithful to their "brothers".

ISTPs like and need to spend time alone, because this is when they can sort things out in their minds most clearly. They absorb large quantities of impersonal facts from the external world, and sort through those facts, making judgments, when they are alone.

ISTPs are action-oriented people. They like to be up and about, doing things. They are not people to sit behind a desk all day and do long-range planning. Adaptable and spontaneous, they respond to what is immediately before them. They usually have strong technical skills, and can be effective technical leaders. They focus on details and practical things. They have an excellent sense of expediency and grasp of the details which enables them to make quick, effective decisions.

ISTPs avoid making judgments based on personal values - they feel that judgments and decisions should be made impartially, based on the fact. They are not naturally tuned in to how they are affecting others. They do not pay attention to their own feelings, and even distrust them and try to ignore them, because they have difficulty distinguishing between emotional reactions and value judgments. This may be a problem area for many ISTPs.

An ISTP who is over-stressed may exhibit rash emotional outbursts of anger, or on the other extreme may be overwhelmed by emotions and feelings which they feel compelled to share with people (often inappropriately). An ISTP who is down on themselves will foray into the world of value judgments - a place which is not natural for the ISTP - and judge themselves by their inability to perform some task. They will then approach the task in a grim emotional state, expecting the worst.

ISTPs are excellent in crisis situations. They're usually good athletes, and have very good hand-eye coordination. They are good at following through with a project, and tying up loose ends. They usually don't have much trouble with school, because they are introverts who can think logically. They are usually patient individuals, although they may be prone to occasional emotional outbursts due to their inattention to their own feelings. ISTPs have a lot of natural ability which makes them good at many different kinds of things. However, they are happiest when they are centered in action-oriented tasks

which require detailed logical analysis and technical skill. They take pride in their ability to take the next correct step.

ISTPs are optimistic, full of good cheer, loyal to their equals, uncomplicated in their desires, generous, trusting and receptive people who want no part in confining commitments.

ISFJ: The Nurturer

As an ISFJ, your primary mode of living is focused internally, where you take things in via your five senses in a literal, concrete fashion. Your secondary mode is external, where you deal with things according to how you feel about them, or how they fit into your personal value system.

ISFJs live in a world that is concrete and kind. They are truly warm and kind-hearted, and want to believe the best of people. They value harmony and cooperation, and are likely to be very sensitive to other people's feelings. People value the ISFJ for their consideration and awareness, and their ability to bring out the best in others by their firm desire to believe the best.

ISFJs have a rich inner world that is not usually obvious to observers. They constantly take in information about people and situations that is personally important to them, and store it away. This tremendous store of information is usually startlingly accurate, because the ISFJ has an exceptional memory about things that are important to their value systems. It would not be uncommon for the ISFJ to remember a particular facial expression or conversation in precise detail years after the event occurred, if the situation made an impression on the ISFJ.

ISFJs have a very clear idea of the way things should be, which they strive to attain. They value security and kindness, and respect traditions and laws. They tend to believe that existing systems are there because they work. Therefore, they're not likely to buy into doing things in a new way, unless they're shown in a concrete way why its better than the established method.

ISFJs learn best by doing, rather than by reading about something in a book, or applying theory. For this reason, they are not likely to be found in fields which require a lot of conceptual analysis or theory. They value practical application. Traditional methods of higher education, which require a lot of theorizing and abstraction, are likely to be a chore for the ISFJ. The ISFJ learns a task best by being shown its practical application. Once the task is learned, and its practical importance is understood, the ISFJ will faithfully and tirelessly carry through the task to completion. The ISFJ is extremely dependable.

The ISFJ has an extremely well-developed sense of space, function, and aesthetic appeal. For that reason, they're likely to have beautifully furnished, functional homes. They make extremely good interior decorators. This special ability, combined with their sensitivity to other's feelings and desires, makes them very likely to be great gift-givers - finding the right gift which will be truly appreciated by the recipient.

More so than other types, ISFJs are extremely aware of their own internal feelings, as well as other people's feelings. They do not usually express their own feelings, keeping

things inside. If they are negative feelings, they may build up inside the ISFJ until they turn into firm judgments against individuals which are difficult to unseed, once set. Many ISFJs learn to express themselves, and find outlets for their powerful emotions. Just as the ISFJ is not likely to express their feelings, they are also not likely to let on that they know how others are feeling. However, they will speak up when they feel another individual really needs help, and in such cases they can truly help others become aware of their feelings.

The ISFJ feels a strong sense of responsibility and duty. They take their responsibilities very seriously, and can be counted on to follow through. For this reason, people naturally tend to rely on them. The ISFJ has a difficult time saying "no" when asked to do something, and may become over-burdened. In such cases, the ISFJ does not usually express their difficulties to others, because they intensely dislike conflict, and because they tend to place other people's needs over their own. The ISFJ needs to learn to identify, value, and express their own needs, if they wish to avoid becoming over-worked and taken for granted.

ISFJs need positive feedback from others. In the absence of positive feedback, or in the face of criticism, the ISFJ gets discouraged, and may even become depressed. When down on themselves or under great stress, the ISFJ begins to imagine all of the things that might go critically wrong in their life. They have strong feelings of inadequacy, and become convinced that "everything is all wrong", or "I can't do anything right".

The ISFJ is warm, generous, and dependable. They have many special gifts to offer, in their sensitivity to others, and their strong ability to keep things running smoothly. They need to remember to not be overly critical of themselves, and to give themselves some of the warmth and love which they freely dispense to others.

ISFP: The Artist

As an ISFP, your primary mode of living is focused internally, where you deal with things according to how you feel about them, or how they fit into your value system. Your secondary mode is external, where you take things in via your five senses in a literal, concrete fashion.

ISFPs live in the world of sensation possibilities. They are keenly in tune with the way things look, taste, sound, feel and smell. They have a strong aesthetic appreciation for art, and are likely to be artists in some form, because they are unusually gifted at creating and composing things which will strongly affect the senses. They have a strong set of values, which they strive to consistently meet in their lives. They need to feel as if they're living their lives in accordance with what they feel is right, and will rebel against anything which conflicts with that goal. They're likely to choose jobs and careers which allow them the freedom of working towards the realization of their value-oriented personal goals.

ISFPs tend to be quiet and reserved, and difficult to get to know well. They hold back their ideas and opinions except from those who they are closest to. They are likely to be kind, gentle and sensitive in their dealings with others. They are interested in contributing to people's sense of well-being and happiness, and will put a great deal of effort and energy into tasks which they believe in.

ISFPs have a strong affinity for aesthetics and beauty. They're likely to be animal lovers, and to have a true appreciation for the beauties of nature. They're original and independent, and need to have personal space. They value people who take the time to understand the ISFP, and who support the ISFP in pursuing their goals in their own, unique way. People who don't know them well may see their unique way of life as a sign of carefree light-heartedness, but the ISFP actually takes life very seriously, constantly gathering specific information and shifting it through their value systems, in search for clarification and underlying meaning.

ISFPs are action-oriented individuals. They are "doers", and are usually uncomfortable with theorizing concepts and ideas, unless they see a practical application. They learn best in a "hands-on" environment, and consequently may become easily bored with the traditional teaching methods, which emphasize abstract thinking. They do not like impersonal analysis, and are uncomfortable with the idea of making decisions based strictly on logic. Their strong value systems demand that decisions are evaluated against their subjective beliefs, rather than against some objective rules or laws.

ISFPs are extremely perceptive and aware of others. They constantly gather specific information about people, and seek to discover what it means. They are usually penetratingly accurate in their perceptions of others.

ISFPs are warm and sympathetic. They genuinely care about people, and are strongly service-oriented in their desire to please. They have an unusually deep well of caring for those who are close to them, and are likely to show their love through actions, rather than words.

ISFPs have no desire to lead or control others, just as they have no desire to be led or controlled by others. They need space and time alone to evaluate the circumstances of their life against their value system, and are likely to respect other people's needs for the same.

The ISFP is likely to not give themselves enough credit for the things which they do extremely well. Their strong value systems can lead them to be intensely perfectionist, and cause them to judge themselves with unnecessary harshness.

The ISFP has many special gifts for the world, especially in the areas of creating artistic sensation, and selflessly serving others. Life is not likely to be extremely easy for the ISFP, because they take life so seriously, but they have the tools to make their lives and the lives of those close to them richly rewarding experiences.

INFJ: The Protector

As an INFJ, your primary mode of living is focused internally, where you take things in primarily via intuition. Your secondary mode is external, where you deal with things according to how you feel about them, or how they fit with your personal value system. INFJs are gentle, caring, complex and highly intuitive individuals. Artistic and creative, they live in a world of hidden meanings and possibilities. Only one percent of the population has an INFJ Personality Type, making it the most rare of all the types.

INFJs place great importance on having things orderly and systematic in their outer world. They put a lot of energy into identifying the best system for getting things done,

and constantly define and re-define the priorities in their lives. On the other hand, INFJs operate within themselves on an intuitive basis which is entirely spontaneous. They know things intuitively, without being able to pinpoint why, and without detailed knowledge of the subject at hand. They are usually right, and they usually know it. Consequently, INFJs put a tremendous amount of faith into their instincts and intuitions. This is something of a conflict between the inner and outer worlds, and may result in the INFJ not being as organized as other Judging types tend to be. Or we may see some signs of disarray in an otherwise orderly tendency, such as a consistently messy desk. INFJs have uncanny insight into people and situations. They get "feelings" about things and intuitively understand them. As an extreme example, some INFJs report experiences of a psychic nature, such as getting strong feelings about there being a problem with a loved one, and discovering later that they were in a car accident. This is the sort of thing that other types may scorn and scoff at, and the INFJ does not really understand their intuition at a level which can be verbalized. Consequently, most INFJs are protective of their inner selves, sharing only what they choose to share when they choose to share it. They are deep, complex individuals, who are quite private and typically difficult to understand. INFJs hold back part of themselves, and can be secretive.

But the INFJ is as genuinely warm as they are complex. INFJs hold a special place in the heart of people who they are close to, who are able to see their special gifts and depth of caring. INFJs are concerned for people's feelings, and try to be gentle to avoid hurting anyone. They are very sensitive to conflict, and cannot tolerate it very well. Situations which are charged with conflict may drive the normally peaceful INFJ into a state of agitation or charged anger. They may tend to internalize conflict into their bodies, and experience health problems when under a lot of stress.

Because the INFJ has such strong intuitive capabilities, they trust their own instincts above all else. This may result in an INFJ stubbornness and tendency to ignore other people's opinions. They believe that they're right. On the other hand, INFJ is a perfectionist who doubts that they are living up to their full potential. INFJs are rarely at complete peace with themselves - there's always something else they should be doing to improve themselves and the world around them. They believe in constant growth, and don't often take time to revel in their accomplishments. They have strong value systems, and need to live their lives in accordance with what they feel is right. In deference to the Feeling aspect of their personalities, INFJs are in some ways gentle and easy going. Conversely, they have very high expectations of themselves, and frequently of their families. They don't believe in compromising their ideals.

INFJ is a natural nurturer; patient, devoted and protective. They make loving parents and usually have strong bonds with their offspring. They have high expectations of their children, and push them to be the best that they can be. This can sometimes manifest itself in the INFJ being hard-nosed and stubborn. But generally, children of an INFJ get devoted and sincere parental guidance, combined with deep caring.

In the workplace, the INFJ usually shows up in areas where they can be creative and somewhat independent. They have a natural affinity for art, and many excel in the sciences, where they make use of their intuition. INFJs can also be found in service-oriented professions. They are not good at dealing with minutia or very detailed tasks. The INFJ will either avoid such things, or else go to the other extreme and become enveloped in the details to the extent that they can no longer see the big picture. An

INFJ who has gone the route of becoming meticulous about details may be highly critical of other individuals who are not.

The INFJ individual is gifted in ways that other types are not. Life is not necessarily easy for the INFJ, but they are capable of great depth of feeling and personal achievement.

INFP: The Idealist

As an INFP, your primary mode of living is focused internally, where you deal with things according to how you feel about them, or how they fit into your personal value system. Your secondary mode is external, where you take things in primarily via your intuition. INFPs, more than other iNtuitive Feeling types, are focused on making the world a better place for people. Their primary goal is to find out their meaning in life. What is their purpose? How can they best serve humanity in their lives? They are idealists and perfectionists, who drive themselves hard in their quest for achieving the goals they have identified for themselves.

INFPs are highly intuitive about people. They rely heavily on their intuitions to guide them, and use their discoveries to constantly search for value in life. They are on a continuous mission to find the truth and meaning underlying things. Every encounter and every piece of knowledge gained gets sifted through the INFP's value system, and is evaluated to see if it has any potential to help the INFP define or refine their own path in life. The goal at the end of the path is always the same - the INFP is driven to help people and make the world a better place.

Generally thoughtful and considerate, INFPs are good listeners and put people at ease. Although they may be reserved in expressing emotion, they have a very deep well of caring and are genuinely interested in understanding people. This sincerity is sensed by others, making the INFP a valued friend and confidante. An INFP can be quite warm with people he or she knows well.

INFPs do not like conflict, and go to great lengths to avoid it. If they must face it, they will always approach it from the perspective of their feelings. In conflict situations, INFPs place little importance on who is right and who is wrong. They focus on the way that the conflict makes them feel, and indeed don't really care whether or not they're right. They don't want to feel badly. This trait sometimes makes them appear irrational and illogical in conflict situations. On the other hand, INFPs make very good mediators, and are typically good at solving other people's conflicts, because they intuitively understand people's perspectives and feelings, and genuinely want to help them.

INFPs are flexible and laid-back, until one of their values is violated. In the face of their value system being threatened, INFPs can become aggressive defenders, fighting passionately for their cause. When an INFP has adopted a project or job which they're interested in, it usually becomes a "cause" for them. Although they are not detail-oriented individuals, they will cover every possible detail with determination and vigor when working for their "cause".

When it comes to the mundane details of life maintenance, INFPs are typically completely unaware of such things. They might go for long periods without noticing a stain on the carpet, but carefully and meticulously brush a speck of dust off of their project booklet.

INFPs do not like to deal with hard facts and logic. Their focus on their feelings and the Human Condition makes it difficult for them to deal with impersonal judgment. They don't understand or believe in the validity of impersonal judgment, which makes them naturally rather ineffective at using it. Most INFPs will avoid impersonal analysis, although some have developed this ability and are able to be quite logical. Under stress, it's not uncommon for INFPs to misuse hard logic in the heat of anger, throwing out fact after (often inaccurate) fact in an emotional outburst.

INFPs have very high standards and are perfectionists. Consequently, they are usually hard on themselves, and don't give themselves enough credit. INFPs may have problems working on a project in a group, because their standards are likely to be higher than other members' of the group. In group situations, they may have a "control" problem. The INFP needs to work on balancing their high ideals with the requirements of every day living. Without resolving this conflict, they will never be happy with themselves, and they may become confused and paralyzed about what to do with their lives.

INFPs are usually talented writers. They may be awkward and uncomfortable with expressing themselves verbally, but have a wonderful ability to define and express what they're feeling on paper. INFPs also appear frequently in social service professions, such as counseling or teaching. They are at their best in situations where they're working towards the public good, and in which they don't need to use hard logic.

INFPs who function in their well-developed sides can accomplish great and wonderful things, which they will rarely give themselves credit for. Some of the great, humanistic catalysts in the world have been INFPs.

INTJ: The Scientist

As an INTJ, your primary mode of living is focused internally, where you take things in primarily via your intuition. Your secondary mode is external, where you deal with things rationally and logically.

INTJs live in the world of ideas and strategic planning. They value intelligence, knowledge, and competence, and typically have high standards in these regards, which they continuously strive to fulfill. To a somewhat lesser extent, they have similar expectations of others.

With Introverted Intuition dominating their personality, INTJs focus their energy on observing the world, and generating ideas and possibilities. Their mind constantly gathers information and makes associations about it. They are tremendously insightful and usually are very quick to understand new ideas. However, their primary interest is not understanding a concept, but rather applying that concept in a useful way. Unlike the INTP, they do not follow an idea as far as they possibly can, seeking only to understand it fully. INTJs are driven to come to conclusions about ideas. Their need for closure and organization usually requires that they take some action.

INTJ's tremendous value and need for systems and organization, combined with their natural insightfulness, makes them excellent scientists. An INTJ scientist gives a gift to society by putting their ideas into a useful form for others to follow. It is not easy for the INTJ to express their internal images, insights, and abstractions. The internal form of the

INTJ's thoughts and concepts is highly individualized, and is not readily translatable into a form that others will understand. However, the INTJ is driven to translate their ideas into a plan or system that is usually readily explainable, rather than to do a direct translation of their thoughts. They usually don't see the value of a direct transaction, and will also have difficulty expressing their ideas, which are non-linear. However, their extreme respect of knowledge and intelligence will motivate them to explain themselves to another person who they feel is deserving of the effort.

INTJs are natural leaders, although they usually choose to remain in the background until they see a real need to take over the lead. When they are in leadership roles, they are quite effective, because they are able to objectively see the reality of a situation, and are adaptable enough to change things which aren't working well. They are the supreme strategists - always scanning available ideas and concepts and weighing them against their current strategy, to plan for every conceivable contingency.

INTJs spend a lot of time inside their own minds, and may have little interest in the other people's thoughts or feelings. Unless their Feeling side is developed, they may have problems giving other people the level of intimacy that is needed. Unless their Sensing side is developed, they may have a tendency to ignore details which are necessary for implementing their ideas.

The INTJ's interest in dealing with the world is to make decisions, express judgments, and put everything that they encounter into an understandable and rational system. Consequently, they are quick to express judgments. Often they have very evolved intuitions, and are convinced that they are right about things. Unless they complement their intuitive understanding with a well-developed ability to express their insights, they may find themselves frequently misunderstood. In these cases, INTJs tend to blame misunderstandings on the limitations of the other party, rather than on their own difficulty in expressing themselves. This tendency may cause the INTJ to dismiss others input too quickly, and to become generally arrogant and elitist.

INTJs are ambitious, self-confident, deliberate, long-range thinkers. Many INTJs end up in engineering or scientific pursuits, although some find enough challenge within the business world in areas which involve organizing and strategic planning. They dislike messiness and inefficiency, and anything that is muddled or unclear. They value clarity and efficiency, and will put enormous amounts of energy and time into consolidating their insights into structured patterns.

Other people may have a difficult time understanding an INTJ. They may see them as aloof and reserved. Indeed, the INTJ is not overly demonstrative of their affections, and is likely to not give as much praise or positive support as others may need or desire. That doesn't mean that he or she doesn't truly have affection or regard for others, they simply do not typically feel the need to express it. Others may falsely perceive the INTJ as being rigid and set in their ways. Nothing could be further from the truth, because the INTJ is committed to always finding the objective best strategy to implement their ideas. The INTJ is usually quite open to hearing an alternative way of doing something. When under a great deal of stress, the INTJ may become obsessed with mindless repetitive, sensate activities, such as over-drinking. They may also tend to become absorbed with minutia and details that they would not normally consider important to their overall goal.

INTJs need to remember to express themselves sufficiently, so as to avoid difficulties with people misunderstandings. In the absence of properly developing their communication abilities, they may become abrupt and short with people, and isolationists.

INTJs have a tremendous amount of ability to accomplish great things. They have insight into the Big Picture, and are driven to synthesize their concepts into solid plans of action. Their reasoning skills give them the means to accomplish that. INTJs are most always highly competent people, and will not have a problem meeting their career or education goals. They have the capability to make great strides in these arenas. On a personal level, the INTJ who practices tolerances and puts effort into effectively communicating their insights to others has everything in his or her power to lead a rich and rewarding life.

INTP: The Thinker

As an INTP, your primary mode of living is focused internally, where you deal with things rationally and logically. Your secondary mode is external, where you take things in primarily via your intuition.

INTPs live in the world of theoretical possibilities. They see everything in terms of how it could be improved, or what it could be turned into. They live primarily inside their own minds, having the ability to analyze difficult problems, identify patterns, and come up with logical explanations. They seek clarity in everything, and are therefore driven to build knowledge. They are the "absent-minded professors", who highly value intelligence and the ability to apply logic to theories to find solutions. They typically are so strongly driven to turn problems into logical explanations, that they live much of their lives within their own heads, and may not place as much importance or value on the external world. Their natural drive to turn theories into concrete understanding may turn into a feeling of personal responsibility to solve theoretical problems, and help society move towards a higher understanding.

INTPs value knowledge above all else. Their minds are constantly working to generate new theories, or to prove or disprove existing theories. They approach problems and theories with enthusiasm and skepticism, ignoring existing rules and opinions and defining their own approach to the resolution. They seek patterns and logical explanations for anything that interests them. They're usually extremely bright, and able to be objectively critical in their analysis. They love new ideas, and become very excited over abstractions and theories. They love to discuss these concepts with others. They may seem "dreamy" and distant to others, because they spend a lot of time inside their minds musing over theories. They hate to work on routine things - they would much prefer to build complex theoretical solutions, and leave the implementation of the system to others. They are intensely interested in theory, and will put forth tremendous amounts of time and energy into finding a solution to a problem with has piqued their interest. INTPs do not like to lead or control people. They're very tolerant and flexible in most situations, unless one of their firmly held beliefs has been violated or challenged, in which case they may take a very rigid stance. The INTP is likely to be very shy when it comes to meeting new people. On the other hand, the INTP is very self-confident and gregarious around people they know well, or when discussing theories which they fully understand.

The INTP has no understanding or value for decisions made on the basis of personal subjectivity or feelings. They strive constantly to achieve logical conclusions to problems, and don't understand the importance or relevance of applying subjective emotional considerations to decisions. For this reason, INTPs are usually not in-tune with how people are feeling, and are not naturally well-equipped to meet the emotional needs of others.

The INTP may have a problem with self-aggrandizement and social rebellion, which will interfere with their creative potential. Since their Feeling side is their least developed trait, the INTP may have difficulty giving the warmth and support that is sometimes necessary in intimate relationships. If the INTP doesn't realize the value of attending to other people's feelings, he or she may become overly critical and sarcastic with others. If the INTP is not able to find a place for themselves which supports the use of their strongest abilities, they may become generally negative and cynical. If the INTP has not developed their Sensing side sufficiently, they may become unaware of their environment, and exhibit weakness in performing maintenance-type tasks, such as bill-paying and dressing appropriately.

For the INTP, it is extremely important that ideas and facts are expressed correctly and succinctly. They are likely to express themselves in what they believe to be absolute truths. Sometimes, their well thought-out understanding of an idea is not easily understandable by others, but the INTP is not naturally likely to tailor the truth so as to explain it in an understandable way to others. The INTP may be prone to abandoning a project once they have figured it out, moving on to the next thing. It's important that the INTP place importance on expressing their developed theories in understandable ways. In the end, an amazing discovery means nothing if you are the only person who understands it.

The INTP is usually very independent, unconventional, and original. They are not likely to place much value on traditional goals such as popularity and security. They usually have complex characters, and may tend to be restless and temperamental. They are strongly ingenious, and have unconventional thought patterns which allow them to analyze ideas in new ways. Consequently, a lot of scientific breakthroughs in the world have been made by the INTP.

The INTP is at his best when he can work on his theories independently. When given an environment which supports his creative genius and possible eccentricity, the INTP can accomplish truly remarkable things. These are the pioneers of new thoughts in our society.

ESTP: The Doer

As an ESTP, your primary mode of living is focused externally, where you take things in via your five senses in a literal, concrete fashion. Your secondary mode is internal, where you deal with things rationally and logically.

ESTPs are outgoing, straight-shooting types. Enthusiastic and excitable, ESTPs are "doers" who live in the world of action. Blunt, straight-forward risk-takers, they are willing to plunge right into things and get their hands dirty. They live in the here-and-now, and place little importance on introspection or theory. They look at the facts of a situation, quickly decide what should be done, execute the action, and move on to the next thing.

ESTPs have an uncanny ability to perceive people's attitudes and motivations. They pick up on little cues which go completely unnoticed by most other types, such as facial expressions and stance. They're typically a couple of steps ahead of the person they're interacting with. ESTPs use this ability to get what they want out of a situation. Rules and laws are seen as guidelines for behavior, rather than mandates. If the ESTP has decided that something needs to be done, then their "do it and get on with it" attitude takes precedence over the rules. However, the ESTP tends to have their own strong belief in what's right and what's wrong, and will doggedly stick to their principles. The Rules of the Establishment may hold little value to the ESTP, but their own integrity mandates that they will not under any circumstances do something which they feel to be wrong.

ESTPs have a strong flair for drama and style. They're fast-moving, fast-talking people who have an appreciation for the finer things in life. They may be gamblers or spendthrifts. They're usually very good at story telling and improvising. They typically makes things up as they go along, rather than following a plan. They love to have fun, and are fun people to be around. They can sometimes be hurtful to others without being aware of it, as they generally do not know and may not care about the effect their words have on others. It's not that they don't care about people; it's that their decision-making process does not involve taking people's feelings into account. They make decisions based on facts and logic.

ESTP's least developed area is their intuitive side. They are impatient with theory, and see little use for it in their quest to "get things done". An ESTP will occasionally have strong intuitions which are often way off-base, but sometimes very lucid and positive. The ESTP does not trust their instincts, and is suspicious of other people's intuition as well.

The ESTP often has trouble in school, especially higher education which moves into realms where theory is more important. The ESTP gets bored with classes in which they feel they gain no useful material which can be used to get things done. The ESTP may be brilliantly intelligent, but school will be a difficult chore for them.

The ESTP needs to keep moving, and so does well in careers where he or she is not restricted or confined. ESTPs make extremely good salespersons. They will become stifled and unhappy dealing with routine chores. ESTPs have a natural abundance of energy and enthusiasm, which makes them natural entrepreneurs. They get very excited about things, and have the ability to motivate others to excitement and action. They can sell anyone on any idea. They are action-oriented, and make decisions quickly. All-in-all, they have extraordinary talents for getting things started. They are not usually so good at following through, and might leave those tasks to others. Mastering the art of following through is something which ESTPs should pay special attention to.

ESTPs are practical, observant, fun-loving, spontaneous risk-takers with an excellent ability to quickly improvise an innovative solution to a problem. They're enthusiastic and fun to be with, and are great motivators. If an ESTP recognizes their real talents and operates within those realms, they can accomplish truly exciting things.

ESTJ: The Guardian

As an ESTJ, your primary mode of living is focused externally, where you deal with things rationally and logically. Your secondary mode is internal, where you take things in via your five senses in a literal, concrete fashion.

ESTJs live in a world of facts and concrete needs. They live in the present, with their eye constantly scanning their personal environment to make sure that everything is running smoothly and systematically. They honor traditions and laws, and have a clear set of standards and beliefs. They expect the same of others, and have no patience or understanding of individuals who do not value these systems. They value competence and efficiency, and like to see quick results for their efforts.

ESTJs are take-charge people. They have such a clear vision of the way that things should be, that they naturally step into leadership roles. They are self-confident and aggressive. They are extremely talented at devising systems and plans for action, and at being able to see what steps need to be taken to complete a specific task. They can sometimes be very demanding and critical, because they have such strongly held beliefs, and are likely to express themselves without reserve if they feel someone isn't meeting their standards. But at least their expressions can be taken at face-value, because the ESTJ is extremely straight-forward and honest.

The ESTJ is usually a model citizen, and pillar of the community. He or she takes their commitments seriously, and follows their own standards of "good citizenship" to the letter. ESTJ enjoys interacting with people, and likes to have fun. ESTJs can be very boisterous and fun at social events, especially activities which are focused on the family, community, or work.

The ESTJ needs to watch out for the tendency to be too rigid, and to become overly detail-oriented. Since they put a lot of weight in their own beliefs, it's important that they remember to value other people's input and opinions. If they neglect their Feeling side, they may have a problem with fulfilling other's needs for intimacy, and may unknowingly hurt people's feelings by applying logic and reason to situations which demand more emotional sensitivity.

When bogged down by stress, an ESTJ often feels isolated from others. They feel as if they are misunderstood and undervalued, and that their efforts are taken for granted. Although normally the ESTJ is very verbal and doesn't have any problem expressing themselves, when under stress they have a hard time putting their feelings into words and communicating them to others.

ESTJs value security and social order above all else, and feel obligated to do all that they can to enhance and promote these goals. They will mow the lawn, vote, join the PTA, attend home owners association meetings, and generally do anything that they can to promote personal and social security.

The ESTJ puts forth a lot of effort in almost everything that they do. They will do everything that they think should be done in their job, marriage, and community with a good amount of energy. He or she is conscientious, practical, realistic, and dependable. While the ESTJ will dutifully do everything that is important to work towards a particular cause or goal, they might not naturally see or value the importance of goals which are outside of their practical scope. However, if the ESTJ is able to see the relevance of

such goals to practical concerns, you can bet that they'll put every effort into understanding them and incorporating them into their quest for clarity and security.

ESFP: The Performer

As an ESFP, your primary mode of living is focused externally, where you take things in via your five senses in a literal, concrete fashion. Your secondary mode is internal, where you deal with things according to how you feel about them, or how they fit with your personal value system.

ESFPs live in the world of people possibilities. They love people and new experiences. They are lively and fun, and enjoy being the center of attention. They live in the here-and-now, and relish excitement and drama in their lives.

ESFPs have very strong inter-personal skills, and may find themselves in the role of the peacemaker frequently. Since they make decisions by using their personal values, they are usually very sympathetic and concerned for other people's well-being. They're usually quite generous and warm. They are very observant about other people, and seem to sense what is wrong with someone before others might, responding warmly with a solution to a practical need. They might not be the best advice-givers in the world, because they dislike theory and future-planning, but they are great for giving practical care.

ESFP is definitely a spontaneous, optimistic individual. They love to have fun. If the ESFP has not developed their Thinking side by giving consideration to rational thought processing, they tend to become over-indulgent, and place more importance on immediate sensation and gratification than on their duties and obligations. They may also avoid looking at long-term consequences of their actions.

For the ESFP, the entire world is a stage. They love to be the center of attention and perform for people. They're constantly putting on a show for others to entertain them and make them happy. They enjoy stimulating other people's senses, and are extremely good at it. They would love nothing more than for life to be a continual party, in which they play the role of the fun-loving host.

ESFPs love people, and everybody loves an ESFP. One of their greatest gifts is their general acceptance of everyone. They are upbeat and enthusiastic, and genuinely like almost everybody. An ESFP is unfailingly warm and generous with their friends, and they generally treat everyone as a friend. However, once crossed, an ESFP is likely to make a very strong and stubborn judgment against the person who crossed them. They are capable of deep dislike in such a situation.

The ESFP under a great deal of stress gets overwhelmed with negatives thoughts and possibilities. As an optimistic individual who lives in the world of possibilities, negative possibilities do not sit well with them. In an effort to combat these thoughts, they're likely to come up with simple, global statements to explain away the problem. These simplistic explanations may or may not truly get to the nature of the issue, but they serve the ESFP well by allowing them to get over it.

ESFPs are likely to be very practical, although they hate structure and routine. They like to "go with the flow", trusting in their ability to improvise in any situation presented to

them. They learn best with "hands-on" experience, rather than by studying a book. They're uncomfortable with theory. If an ESFP hasn't developed their intuitive side, they may tend to avoid situations which involve a lot of theoretical thinking, or which are complex and ambiguous. For this reason, an ESFP may have difficulty in school. On the other hand, the ESFP does extremely well in situations where they're allowed to learn by interacting with others, or in which they "learn by doing."

ESFPs have a very well-developed appreciation for aesthetic beauty, and an excellent sense of space and function. If they have the means, they're likely to have many beautiful possessions, and an artfully furnished home. In general, they take great pleasure in objects of aesthetic beauty. They're likely to have a strong appreciation for the finer things in life, such as good food and good wine.

The ESFP is a great team player. He or she is not likely to create any problems or fuss, and is likely to create the most fun environment possible for getting the task done. ESFPs will do best in careers in which they are able to use their excellent people skills, along with their abilities to meld ideas into structured formats. Since they are fast-paced individuals who like new experiences, they should choose careers which offer or require a lot of diversity, as well as people skills.

ESFPs usually like to feel strongly bonded with other people, and have a connection with animals and small children that is not found in most other types. They're likely to have a strong appreciation for the beauties of nature as well.

The ESFP has a tremendous love for life, and knows how to have fun. They like to bring others along on their fun-rides, and are typically a lot of fun to be with. They're flexible, adaptable, genuinely interested in people, and usually kind-hearted. They have a special ability to get a lot of fun out of life, but they need to watch out for the pitfalls associated with living entirely in the moment.

ESFJ: The Caregiver

As an ESFJ, your primary mode of living is focused externally, where you deal with things according to how you feel about them, or how they fit in with your personal value system. Your secondary mode is internal, where you take things in via your five senses in a literal, concrete fashion.

ESFJs are people persons - they love people. They are warmly interested in others. They use their Sensing and Judging characteristics to gather specific, detailed information about others, and turn this information into supportive judgments. They want to like people, and have a special skill at bringing out the best in others. They are extremely good at reading others, and understanding their point of view. The ESFJ's strong desire to be liked and for everything to be pleasant makes them highly supportive of others. People like to be around ESFJs, because the ESFJ has a special gift of invariably making people feel good about themselves.

The ESFJ takes their responsibilities very seriously, and is very dependable. They value security and stability, and have a strong focus on the details of life. They see before others do what needs to be done, and do whatever it takes to make sure that it gets done. They enjoy these types of tasks, and are extremely good at them.

ESFJs are warm and energetic. They need approval from others to feel good about themselves. They are hurt by indifference and don't understand unkindness. They are very giving people, who get a lot of their personal satisfaction from the happiness of others. They want to be appreciated for who they are, and what they give. They're very sensitive to others, and freely give practical care. ESFJs are such caring individuals, that they sometimes have a hard time seeing or accepting a difficult truth about someone they care about.

With Extraverted Feeling dominating their personality, ESFJs are focused on reading other people. They have a strong need to be liked, and to be in control. They are extremely good at reading others, and often change their own manner to be more pleasing to whoever they're with at the moment.

The ESFJ's value system is defined externally. They usually have very well-formed ideas about the way things should be, and are not shy about expressing these opinions. However, they weigh their values and morals against the world around them, rather than against an internal value system. They may have a strong moral code, but it is defined by the community that they live in, rather than by any strongly felt internal values. ESFJs who have had the benefit of being raised and surrounded by a strong value system that is ethical and centered around genuine goodness will most likely be the kindest, most generous souls who will gladly give you the shirt off of their back without a second thought. For these individuals, the selfless quality of their personality type is genuine and pure. ESFJs that have not had the advantage of developing their own values by weighing them against a good external value system may develop very questionable values. In such cases, the ESFJ most often genuinely believes in the integrity of their skewed value system. They have no internal understanding of values to set them straight. In weighing their values against our society, they find plenty of support for whatever moral transgression they wish to justify. This type of ESFJ is a dangerous person indeed. Extraverted Feeling drives them to control and manipulate, and their lack of Intuition prevents them from seeing the big picture. They're usually quite popular and good with people, and good at manipulating them. Unlike their ENFJ cousin, they don't have Intuition to help them understand the real consequences of their actions. They are driven to manipulate other to achieve their own ends, yet they believe that they are following a solid moral code of conduct.

All ESFJs have a natural tendency to want to control their environment. Their dominant function demands structure and organization, and seeks closure. ESFJs are most comfortable with structured environments. They're not likely to enjoy having to do things which involve abstract, theoretical concepts, or impersonal analysis. They do enjoy creating order and structure, and are very good at tasks which require these kinds of skills. ESFJs should be careful about controlling people in their lives who do not wish to be controlled.

ESFJs respect and believe in the laws and rules of authority, and believe that others should do so as well. They're traditional, and prefer to do things in the established way, rather than venturing into unchartered territory. Their need for security drives their ready acceptance and adherence to the policies of the established system. This tendency may cause them to sometimes blindly accept rules without questioning or understanding them.

An ESFJ who has developed in a less than ideal way may be prone to being quite insecure, and focus all of their attention on pleasing others. He or she might also be very controlling, or overly sensitive, imagining bad intentions when there weren't any. ESFJs incorporate many of the traits that are associated with women in our society. However, male ESFJs will usually not appear feminine at all. On the contrary, ESFJs are typically quite conscious about gender roles and will be most comfortable playing a role that suits their gender in our society. Male ESFJs will be quite masculine (albeit sensitive when you get to know them), and female ESFJs will be very feminine. ESFJs at their best are warm, sympathetic, helpful, cooperative, tactful, down-to-earth, practical, thorough, consistent, organized, enthusiastic, and energetic. They enjoy tradition and security, and will seek stable lives that are rich in contact with friends and family.

ENFP: The Inspirer

As an ENFP, your primary mode of living is focused externally, where you take things in primarily via your intuition. Your secondary mode is internal, where you deal with things according to how you feel about them, or how they fit in with your personal value system.

ENFPs are warm, enthusiastic people, typically very bright and full of potential. They live in the world of possibilities, and can become very passionate and excited about things. Their enthusiasm lends them the ability to inspire and motivate others, more so than we see in other types. They can talk their way in or out of anything. They love life, seeing it as a special gift, and strive to make the most out of it.

ENFPs have an unusually broad range of skills and talents. They are good at most things which interest them. Project-oriented, they may go through several different careers during their lifetime. To onlookers, the ENFP may seem directionless and without purpose, but ENFPs are actually quite consistent, in that they have a strong sense of values which they live with throughout their lives. Everything that they do must be in line with their values. An ENFP needs to feel that they are living their lives as their true Self, walking in step with what they believe is right. They see meaning in everything, and are on a continuous quest to adapt their lives and values to achieve inner peace. They're constantly aware and somewhat fearful of losing touch with themselves. Since emotional excitement is usually an important part of the ENFP's life, and because they are focused on keeping "centered", the ENFP is usually an intense individual, with highly evolved values.

An ENFP needs to focus on following through with their projects. This can be a problem area for some of these individuals. Unlike other extraverted types, ENFPs need time alone to center themselves, and make sure they are moving in a direction which is in sync with their values. ENFPs that remain centered will usually be quite successful at their endeavors. Others may fall into the habit of dropping a project when they become excited about a new possibility, and thus they never achieve the great accomplishments which they are capable of achieving.

Most ENFPs have great people skills. They are genuinely warm and interested in people, and place great importance on their inter-personal relationships. ENFPs almost always have a strong need to be liked. Sometimes, especially at a younger age, an ENFP will tend to be "gushy" and insincere, and generally "overdo" in an effort to win acceptance. However, once an ENFP has learned to balance their need to be true to

themselves with their need for acceptance, they excel at bringing out the best in others, and are typically well-liked. They have an exceptional ability to intuitively understand a person after a very short period of time, and use their intuition and flexibility to relate to others on their own level.

Because ENFPs live in the world of exciting possibilities, the details of everyday life are seen as trivial drudgery. They place no importance on detailed, maintenance-type tasks, and will frequently remain oblivious to these types of concerns. When they do have to perform these tasks, they do not enjoy themselves. This is a challenging area of life for most ENFPs, and can be frustrating for ENFP's family members.

An ENFP who has "gone wrong" may be quite manipulative - and very good at it. The gift of gab which they are blessed with makes it naturally easy for them to get what they want. Most ENFPs will not abuse their abilities, because that would not jive with their value systems.

ENFPs sometimes make serious errors in judgment. They have an amazing ability to intuitively perceive the truth about a person or situation, but when they apply judgment to their perception, they may jump to the wrong conclusions.

ENFPs that have not learned to follow through may have a difficult time remaining happy in marital relationships. Always seeing the possibilities of what could be, they may become bored with what actually is. The strong sense of values will keep many ENFPs dedicated to their relationships. However, ENFPs like a little excitement in their lives, and are best matched with individuals who are comfortable with change and new experiences.

Having an ENFP parent can be a fun-filled experience, but may be stressful at times for children with strong Sensing or Judging tendencies. Such children may see the ENFP parent as inconsistent and difficult to understand, as the children are pulled along in the whirlwind life of the ENFP. Sometimes the ENFP will want to be their child's best friend, and at other times they will play the parental authoritarian. But ENFPs are always consistent in their value systems, which they will impress on their children above all else, along with a basic joy of living.

ENFPs are basically happy people. They may become unhappy when they are confined to strict schedules or mundane tasks. Consequently, ENFPs work best in situations where they have a lot of flexibility, and where they can work with people and ideas. Many go into business for themselves. They have the ability to be quite productive with little supervision, as long as they are excited about what they're doing.

Because they are so alert and sensitive, constantly scanning their environments, ENFPs often suffer from muscle tension. They have a strong need to be independent, and resist being controlled or labeled. They need to maintain control over themselves, but they do not believe in controlling others. Their dislike of dependence and suppression extends to others as well as to themselves.

ENFPs are charming, ingenuous, risk-taking, sensitive, people-oriented individuals with capabilities ranging across a broad spectrum. They have many gifts which they will use to fulfill themselves and those near them, if they are able to remain centered and master the ability of following through.

ENFJ: The Giver

As an ENFJ, your primary mode of living is focused externally, where you deal with things according to how you feel about them, or how they fit into your personal value system. Your secondary mode is internal, where you take things in primarily via your intuition.

ENFJs are people-focused individuals. They live in the world of people possibilities. More so than any other type, they have excellent people skills. They understand and care about people, and have a special talent for bringing out the best in others. ENFJ's main interest in life is giving love, support, and a good time to other people. They are focused on understanding, supporting, and encouraging others. They make things happen for people, and get their best personal satisfaction from this.

Because ENFJ's people skills are so extraordinary, they have the ability to make people do exactly what they want them to do. They get under people's skins and get the reactions that they are seeking. ENFJ's motives are usually unselfish, but ENFJs who have developed less than ideally have been known to use their power over people to manipulate them.

ENFJs are so externally focused that it's especially important for them to spend time alone. This can be difficult for some ENFJs, because they have the tendency to be hard on themselves and turn to dark thoughts when alone. Consequently, ENFJs might avoid being alone, and fill their lives with activities involving other people. ENFJs tend to define their life's direction and priorities according to other people's needs, and may not be aware of their own needs. It's natural to their personality type that they will tend to place other people's needs above their own, but they need to stay aware of their own needs so that they don't sacrifice themselves in their drive to help others.

ENFJs tend to be more reserved about exposing themselves than other extraverted types. Although they may have strongly-felt beliefs, they're likely to refrain from expressing them if doing so would interfere with bringing out the best in others. Because their strongest interest lies in being a catalyst of change in other people, they're likely to interact with others on their own level, in a chameleon-like manner, rather than as individuals. Which is not to say that the ENFJ does not have opinions. ENFJs have definite values and opinions which they're able to express clearly and succinctly. These beliefs will be expressed as long as they're not too personal. ENFJ is in many ways expressive and open, but is more focused on being responsive and supportive of others. When faced with a conflict between a strongly-held value and serving another person's need, they are highly likely to value the other person's needs.

The ENFJ may feel quite lonely even when surrounded by people. This feeling of aloneness may be exacerbated by the tendency to not reveal their true selves. People love ENFJs. They are fun to be with, and truly understand and love people. They are typically very straight-forward and honest. Usually ENFJs exude a lot of self-confidence, and have a great amount of ability to do many different things. They are generally bright, full of potential, energetic and fast-paced. They are usually good at anything which captures their interest.

ENFJs like for things to be well-organized, and will work hard at maintaining structure and resolving ambiguity. They have a tendency to be fussy, especially with their home environments.

In the work place, ENFJs do well in positions where they deal with people. They are naturals for the social committee. Their uncanny ability to understand people and say just what needs to be said to make them happy makes them naturals for counseling. They enjoy being the center of attention, and do very well in situations where they can inspire and lead others, such as teaching.

ENFJs do not like dealing with impersonal reasoning. They don't understand or appreciate its merit, and will be unhappy in situations where they're forced to deal with logic and facts without any connection to a human element. Living in the world of people possibilities, they enjoy their plans more than their achievements. They get excited about possibilities for the future, but may become easily bored and restless with the present.

ENFJs have a special gift with people, and are basically happy people when they can use that gift to help others. They get their best satisfaction from serving others. Their genuine interest in Humankind and their exceptional intuitive awareness of people makes them able to draw out even the most reserved individuals.

ENFJs have a strong need for close, intimate relationships, and will put forth a lot of effort in creating and maintaining these relationships. They're very loyal and trustworthy once involved in a relationship.

An ENFJ who has not developed their Feeling side may have difficulty making good decisions, and may rely heavily on other people in decision-making processes. If they have not developed their Intuition, they may not be able to see possibilities, and will judge things too quickly based on established value systems or social rules, without really understanding the current situation. An ENFJ who has not found their place in the world is likely to be extremely sensitive to criticism, and to have the tendency to worry excessively and feel guilty. They are also likely to be very manipulative and controlling with others.

In general, ENFJs are charming, warm, gracious, creative and diverse individuals with richly developed insights into what makes other people tick. This special ability to see growth potential in others combined with a genuine drive to help people makes the ENFJ a truly valued individual. As giving and caring as the ENFJ is, they need to remember to value their own needs as well as the needs of others.

ENTP: The Visionary

As an ENTP, your primary mode of living is focused externally, where you take things in primarily via your intuition. Your secondary mode is internal, where you deal with things rationally and logically.

With Extraverted Intuition dominating their personality, the ENTP's primary interest in life is understanding the world that they live in. They are constantly absorbing ideas and images about the situations they are presented in their lives. Using their intuition to process this information, they are usually extremely quick and accurate in their ability to

size up a situation. With the exception of their ENFP cousin, the ENTP has a deeper understanding of their environment than any of the other types.

This ability to intuitively understand people and situations puts the ENTP at a distinct advantage in their lives. They generally understand things quickly and with great depth. Accordingly, they are quite flexible and adapt well to a wide range of tasks. They are good at most anything that interests them. As they grow and further develop their intuitive abilities and insights, they become very aware of possibilities, and this makes them quite resourceful when solving problems.

ENTPs are idea people. Their perceptive abilities cause them to see possibilities everywhere. They get excited and enthusiastic about their ideas, and are able to spread their enthusiasm to others. In this way, they get the support that they need to fulfill their visions.

ENTPs are less interested in developing plans of actions or making decisions than they are in generating possibilities and ideas. Following through on the implementation of an idea is usually a chore to the ENTP. For some ENTPs, this results in the habit of never finishing what they start. The ENTP who has not developed their Thinking process will have problems with jumping enthusiastically from idea to idea, without following through on their plans. The ENTP needs to take care to think through their ideas fully in order to take advantage of them.

The ENTP's auxiliary process of Introverted Thinking drives their decision making process. Although the ENTP is more interested in absorbing information than in making decisions, they are quite rational and logical in reaching conclusions. When they apply Thinking to their Intuitive perceptions, the outcome can be very powerful indeed. A well-developed ENTP is extremely visionary, inventive, and enterprising.

ENTPs are fluent conversationalists, mentally quick, and enjoy verbal sparring with others. They love to debate issues, and may even switch sides sometimes just for the love of the debate. When they express their underlying principles, however, they may feel awkward and speak abruptly and intensely.

The ENTP personality type is sometimes referred to the "Lawyer" type. The ENTP "lawyer" quickly and accurately understands a situation, and objectively and logically acts upon the situation. Their Thinking side makes their actions and decisions based on an objective list of rules or laws. If the ENTP was defending someone who had actually committed a crime, they are likely to take advantage of quirks in the law that will get their client off the hook. If they were to actually win the case, they would see their actions as completely fair and proper to the situation, because their actions were lawful. The guilt or innocence of their client would not be as relevant. If this type of reasoning goes completely unchecked by the ENTP, it could result in a character that is perceived by others as unethical or even dishonest. The ENTP, who does not naturally consider the more personal or human element in decision making, should take care to notice the subjective, personal side of situations. This is a potential problem area for ENTPs. Although their logical abilities lend strength and purpose to the ENTP, they may also isolate them from their feelings and from other people.

The least developed area for the ENTP is the Sensing-Feeling arena. If the Sensing areas are neglected, the ENTP may tend to not take care of details in their life. If the

Feeling part of themselves is neglected, the ENTP may not value other people's input enough, or may become overly harsh and aggressive.

Under stress, the ENTP may lose their ability to generate possibilities, and become obsessed with minor details. These details may seem to be extremely important to the ENTP, but in reality are usually not important to the big picture.

In general, ENTPs are upbeat visionaries. They highly value knowledge, and spend much of their lives seeking a higher understanding. They live in the world of possibilities, and become excited about concepts, challenges and difficulties. When presented with a problem, they're good at improvising and quickly come up with a creative solution. Creative, clever, curious, and theoretical, ENTPs have a broad range of possibilities in their lives.

ENTJ: The Executive

As an ENTJ, your primary mode of living is focused externally, where you deal with things rationally and logically. Your secondary mode is internal, where you take things in primarily via your intuition.

ENTJs are natural born leaders. They live in a world of possibilities where they see all sorts challenges to be surmounted, and they want to be the ones responsible for surmounting them. They have a drive for leadership, which is well-served by their quickness to grasp complexities, their ability to absorb a large amount of impersonal information, and their quick and decisive judgments. They are "take charge" people.

ENTJs are very career-focused, and fit into the corporate world quite naturally. They are constantly scanning their environment for potential problems which they can turn into solutions. They generally see things from a long-range perspective, and are usually successful at identifying plans to turn problems around - especially problems of a corporate nature. ENTJs are usually successful in the business world, because they are so driven to leadership. They're tireless in their efforts on the job, and driven to visualize where an organization is headed. For these reasons, they are natural corporate leaders. There is not much room for error in the world of the ENTJ. They dislike to see mistakes repeated, and have no patience with inefficiency. They may become quite harsh when their patience is tried in these respects, because they are not naturally tuned in to people's feelings, and more than likely don't believe that they should tailor their judgments in consideration for people's feelings. ENTJs, like many types, have difficulty seeing things from outside their own perspective. Unlike other types, ENTJs naturally have little patience with people who do not see things the same way as the ENTJ. The ENTJ needs to consciously work on recognizing the value of other people's opinions, as well as the value of being sensitive towards people's feelings. In the absence of this awareness, the ENTJ will be a forceful, intimidating and overbearing individual. This may be a real problem for the ENTJ, who may be deprived of important information and collaboration from others. In their personal world, it can make some ENTJs overbearing as spouses or parents.

The ENTJ has a tremendous amount of personal power and presence which will work for them as a force towards achieving their goals. However, this personal power is also an agent of alienation and self-aggrandizement, which the ENTJ would do well to avoid.

ENTJs are very forceful, decisive individuals. They make decisions quickly, and are quick to verbalize their opinions and decisions to the rest of the world. The ENTJ who has not developed their Intuition will make decisions too hastily, without understanding all of the issues and possible solutions. On the other hand, an ENTJ who has not developed their Thinking side will have difficulty applying logic to their insights, and will often make poor decisions. In that case, they may have brilliant ideas and insight into situations, but they may have little skill at determining how to act upon their understanding, or their actions may be inconsistent. An ENTJ who has developed in a generally less than ideal way may become dictatorial and abrasive - intrusively giving orders and direction without a sound reason for doing so, and without consideration for the people involved.

Although ENTJs are not naturally tuned into other people's feelings, these individuals frequently have very strong sentimental streaks. Often these sentiments are very powerful to the ENTJ, although they will likely hide it from general knowledge, believing the feelings to be a weakness. Because the world of feelings and values is not where the ENTJ naturally functions, they may sometimes make value judgments and hold onto submerged emotions which are ill-founded and inappropriate, and will cause them problems - sometimes rather serious problems.

ENTJs love to interact with people. As Extroverts, they're energized and stimulated primarily externally. There's nothing more enjoyable and satisfying to the ENTJ than having a lively, challenging conversation. They especially respect people who are able to stand up to the ENTJ, and argue persuasively for their point of view. There aren't too many people who will do so, however, because the ENTJ is a very forceful and dynamic presence who has a tremendous amount of self-confidence and excellent verbal communication skills. Even the most confident individuals may experience moments of self-doubt when debating a point with an ENTJ.

ENTJs want their home to be beautiful, well-furnished, and efficiently run. They're likely to place much emphasis on their children being well-educated and structured, to desire a congenial and devoted relationship with their spouse. At home, the ENTJ needs to be in charge as much as he or she does in their career. The ENTJ is likely best paired with someone who has a strong self-image, who is also a Thinking type. Because the ENTJ is primarily focused on their careers, some ENTJs have a problem with being constantly absent from home, physically or mentally.

The ENTJ has many gifts which make it possible for them to have a great deal of personal power, if they don't forget to remain balanced in their lives. They are assertive, innovative, long-range thinkers with an excellent ability to translate theories and possibilities into solid plans of action. They are usually tremendously forceful personalities, and have the tools to accomplish whatever goals they set out for.

(Adapted from www.personalitypage.com)

APPENDIX J

The Eden Alternative Ten Principles

1. The three plagues of loneliness, helplessness and boredom account for the bulk of suffering among our Elders.
2. An Elder-centered community commits to creating a Human Habitat where life revolves around close and continuing contact with plants, animals and children. It is these relationships that provide the young and old alike with a pathway to a life worth living.
3. Loving companionship is the antidote to loneliness. Elders deserve easy access to human and animal companionship.
4. An Elder-centered community creates opportunity to give as well as receive care. This is the antidote to helplessness.
5. An Elder-centered community imbues daily life with variety and spontaneity by creating an environment in which expected and unpredictable interactions and happenings can take place. This is the antidote to boredom.
6. Meaningless activity corrodes the human spirit. The opportunity to do things that we find meaningful is essential to human health.
7. Medical treatment (medical model) should be the servant of genuine human caring, never its master.
8. An Elder-centered community honors its Elders by de-emphasizing top-down bureaucratic authority, seeking instead to place the maximum possible decision-making authority into the hands of the Elders or into the hands of those closest to them.
9. Creating an Elder-centered community is a never-ending process. Human growth must never be separated from human life.
10. Wise leadership is the lifeblood of any struggle against the three plagues. For it, there can be no substitute.

(Thomas, 1996)

APPENDIX K

Values Clarification

Cultural Values

Cultural values are those principles that you have learned throughout your life. These standards often come from parents, family and friends who surround you as you develop. Because society is made up of many different cultures, there are many different cultural values. The list that follows gives just a few examples. Do you recognize any of your cultural values?

- Be religious, believe in God, attend church or synagogue
- Be skeptical toward things that cannot be empirically proven
- Be practical and use your common sense
- Become educated in the liberal arts and sciences
- Be a true individualist and make your own way in life
- Develop contacts and get to know the "right" people
- Some occupations are better than others
- All work has worth and dignity
- Family comes first

Below, list at least five principles/values you feel you received from your family and experiences that reflect your cultural values.

- 1.
- 2.
- 3.
- 4.
- 5.

Personal Values

Personal values are often very similar to cultural values because they can be learned from and shared with family and friends. However, these standards constantly are being developed as you grow and change as a person, sometimes differing from what parents and others value. The following is a list of personal values. Check the 10 that are most important to you.

- _____ Achievement, accomplishment
- _____ Aesthetics - appreciation of beauty, for beauty's sake
- _____ Loyalty - maintaining allegiance to a person, group
- _____ Morality - belief in and maintaining ethical standards
- _____ Knowledge - seeking of the truth, information
- _____ Love - warmth, attachment, devotion
- _____ Altruism - regard for the interest of others

- _____ Autonomy - ability to be self-determining
- _____ Creativity - creating innovative ideas and designs
- _____ Emotional well-being or peace of mind
- _____ Health
- _____ Honesty, integrity
- _____ Recognition
- _____ Skill
- _____ Physical appearance
- _____ Wealth
- _____ Pleasure, fulfillment
- _____ Wisdom, insight
- _____ Other (list)

Below, list at least five personal values (can be listed above or something you thought of).

- 1.
- 2.
- 3.
- 4.
- 5.

Work Values

Work values are those aspects of your job that are important to you such as rewards and satisfaction. Each organization has its own "culture" or value structure. This determines the work and accomplishments that are rewarded by that particular organization. The following list describes a wide variety of satisfactions that people obtain from their jobs. Look at the definitions of these various satisfactions and rate the degree of importance that you would assign to each, using the scale below:

1 = Not important 2 = Moderately important 3 = Important 4 = Very important

- _____ Help Society: Do something to contribute to making the world a better place in which to live.
- _____ Help Others: Be involved in helping other people in a direct way, with individuals or small groups.
- _____ Public Contact: Have a lot of day-to-day contact with people.
- _____ Work with Others: Have close working relationships with a group; work as a team toward common goals.
- _____ Competition: Engage in activities that put my abilities against others in a situation where there are clear win-lose outcomes.
- _____ Make Decisions: Have the power to decide courses of action, policies, etc.
- _____ Work Under Pressure: Work in situations where time pressure is prevalent and/or the quality of my work is judged critically by supervisors.
- _____ Power and Authority: Control the work activities or (partially) the destinies of other people.
- _____ Work Alone: Do projects by myself, without any significant amount of contact with others.

- _____ Intellectual Status: Be regarded as a person of high intellectual prowess or as one who is an acknowledged "Expert" in a given field.
- _____ Creativity (general): Create new ideas, programs or systems not following a format previously developed by others.
- _____ Supervision: Have a job in which I am directly responsible for the work done by others.
- _____ Change and Variety: Have work responsibilities that frequently change in their content and setting.
- _____ Precision Work: Work in situations where there is very little tolerance for error.
- _____ Security: Be assured of keeping my job and a reasonable financial reward.
- _____ Recognition: Be recognized for the quality of my work in some visible or public way.
- _____ Excitement: Experience a high degree of (or frequent) excitement in the course of my work.
- _____ Profit, Gain: Have a strong likelihood of accumulating large amounts of money or other material gain.
- _____ Independence: Be able to determine the nature of my work without significant direction from others; be my own boss.
- _____ Moral Fulfillment: Feel that my work is contributing significantly to a set of moral standards that I feel are very important.
- _____ Location: Find a place to live (town, geographical area) which is conducive to my lifestyle and allows me the opportunity to do the things I enjoy most.
- _____ Community: Live in a town or city where I can get involved in community affairs.
- _____ Time/Freedom: Have work responsibilities that I can work at according to my own time schedule.

Choose 5 of these work values which are most important to you and write them below.

- 1.
- 2.
- 3.
- 4.
- 5.

Finally, you are asked to list the *top five cultural, personal and work values* you have determined from the previous exercises. Always keep in mind that you are not limited to those values that are listed and may add your own.

Cultural	Personal	Work
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.

(adapted from exercises in Lock, R. D. (1988). Taking Charge of Your Career Directions. Pacific Grove, CA: Brooks/Cole Publishing Co.)

APPENDIX L

Dare to Share

People make decisions based upon their values. As a leader, you must be able to understand the difference between your personal values and the interests of your group. You should know where you place value in your life.

Each of the following exercises has two people working in the familiar pair of storyteller and scribe. First one person will tell their tale, with the listener paying active attention while scribbling down the keywords out of the story. Before choosing the storytelling topic, remember to draw on your sense of playfulness, and imagine that this is a very informal speaking engagement in which you have been asked to discourse on the fascinating topic of you, highlighting the important points in your history.

Pair up partners who are not close friends. Partners will switch roles at the end of the full set of exercises. The scribe should mark the exercise numbers and their keywords or phrases. Keywords are things or qualities that are important, or that are recurring themes, or that describe an ethical stance. Try to record the actual words used by the storyteller.

- 1) Take a few minutes to describe something that you do really well (this can be anything: hobby, work, craft, sport). Talk about why you think that you do it so well, and also about what "feels right" about it. Speculate about what makes this particular thing such a success with you.
- 2) Take a few minutes to tell a story about a moment that inspired or impressed you, that caused you to pause, and think, and make some kind of change or resolution. Describe what you were feeling and thinking at the moment when this happened, and allow the drama of the moment to take its time. Also, describe the change that happened in you after that moment.
- 3) Imagine that you have been asked to pass along a special secret to future generations, the secret of life that you have learned over the many years. Each person's secret is unique, and they are being recorded for the future so that no potential wisdom out of time is lost. You are passing this secret along to unknown future people, so you want to use the clearest and most descriptive language possible. Tell this secret of life, stating it both directly and with the use of metaphors or examples.
- 4) You admit that you do not know everything, that there are still questions you cannot answer. However, imagine that you are presented with the opportunity to have any question answered. Talk about the things you muse about, and describe the questions you would present to a source of knowledge through this extraordinary opportunity.
- 5) Describe a success in your recent past that came as the culmination of hard work and dedication. This does not have to have been something that took a long time, just something that you kept working at until it was right. What were the elements of the work that made the outcome a success? Tell this story as parable--an example illustrating a lesson.

Further notes on the exercise:

Interpreting the results of this exercise can be done after both partners are done. Take several minutes in pairs to give feedback to the other person about what seemed important, what the person seems to value in life. Then, see what comes up in a group discussion.

Question 1: The areas of life that you do well or that seem naturally right to you are also possible sources of your most basic values, but try to discriminate between physical talent and what "feels right" about it for clues about values.

Question 2: Moments of inspiration that cause a change are moments that affect you deeply and shape values related to the experience.

Questions 3 and 5: Questions in which you are asked to pass along wisdom or lessons are directly related to what you value in life.

Question 4: Your questions about life indicate areas of growing or changing awareness about life, so are especially important to understand.

(Adapted from Lois M. Frey, UVM Extension, RR #4, Box 2298, Montpelier, VT 05602, (802) 223-2389, email: lfrey@sover.net "Group Development: Creating Group Effectiveness" by Duane Dale, DFD Associates, 99 Brattle Street, Cambridge, MA 02138-3402 (moving to 764 South East Street, Amherst, MA 01022 after 8/1/98); Bob Biagi, 142 Cherry Lane, Amherst, MA 01002 (413) 549-1412)

APPENDIX M

Role Play: Stereotypical Personalities

Group Task: To determine a time and plan for today's shared lunch.

Participants:

Task Master - You are very focused on getting this decision made as quickly and efficiently as possible. You are not tolerant of side discussions or wishy-washy opinions. You want to figure this out and get on to your next task.

Procrastinator – You are hoping these meetings won't happen too soon, because there are too many other places you'd rather be. Maybe if you drag your feet, everyone will decide to wait awhile before getting together again.

Disinterested/Hostile – You really don't get these meetings at all. They seem like a waste of your valuable time and you really resent being here today, let alone scheduling another one of these stupid sessions.

Tangential – It's very hard for you to focus on one topic. Everything that someone says makes you think of something else that you want to bring up. There's so much to decide. Maybe you have a touch of ADD...

Uniter/Peacemaker – You seek harmony and hate conflict. You will bend over backwards to try to smooth out any disagreement or hostility that you sense in the group. The final outcome is less important than having everyone get along.

"Yes-person" – You want to be well liked and recognized as a team player. You don't want to offend anyone who might influence your job, so you enthusiastically support and echo other people's suggestions and have little of your own to offer.

Listener – You tend to be quiet when everyone else is trying to talk. You are good at listening to others, hearing their words and their meaning. You have good ideas, but probably won't volunteer them unless you are asked.

(Credited to: Allen Power, MD.)

APPENDIX N

Appreciating Differences Through Type

Isabel Myers created the Type Table as a useful way of arranging the 16 Types. Once having learned how the table is made up, it is then just a further step to using it to determine the dynamics of each Type. (See Part 2.) The Type Table consists of four rows across and four columns up and down. Follow the order of the letters of Type itself to remember how the 4 X 4 grid is arranged.

The first letter in a Type tells what **Attitude** it is, whether it is **Extraverted** or **Introverted**. The bottom two rows are for the Extraverted Types and the top two rows are for the Introverted Types. To help you remember, think of the Introverts as having their heads in the clouds and the Extraverts with their feet on the ground.

The second letter indicates the **Perceiving function**. The left two columns are for the **Sensing** types and the **Intuitive** types are in the two columns on the right. They are placed in the same order as S-N. Think of left-brained as having linear, step-by-step thoughts (Sensing), while the right-brained process in a more holistic manner (Intuition).

The third letter points to the **Judging functions**. This time, the outer columns are the **Thinking** types, while the inner columns are the **Feeling** types. Remember that Feeling types like to be close to one another, but the Thinking types can stay by themselves.

The final letter shows our **Orientation to the outer world**. This is the part that people notice about us most. The **Judging** types are on the top and bottom rows, and the **Perceiving** types are on the middle two rows. Remember that Judging types like to keep the boundaries and so are like a fence on either side of the Perceiving types who might fly off in all directions if the Judging types weren't there to hold them in check.

Notice that any two types beside one another vertically or horizontally have only one letter different. Types that are one space apart along the diagonal have two letters different; and if they are two spaces apart along the diagonal, all four letters are different. When all four letters are the opposite, this is sometimes known as your **shadow type**. **INFJ** and **ESTP** are said to be **shadow types** and have all four letters opposite.

ISTJ	ISFJ	INFJ	INTJ
ISTP	ISFP	INFP	INTP
ESTP	ESFP	ENFP	ENTP
ESTJ	ESFJ	ENFJ	ENTJ

APPENDIX O

The Five Stages of Group Development

Forming

This is the beginning stage, when people are just getting acquainted and are more reserved and tentative. They will tend to look for guidance from leaders and to rely on old patterns of “safe” behavior. It’s unusual to “stick your neck out” in the early stages of a group. There may be worries about acceptance and confidentiality. Members will tend to look for people who are similar to them. Early on, it’s natural to avoid controversy, and to not get into very personal issues. At this stage, it’s important to set ground rules and to decide on the tasks and goals of the group. It’s also important to take time to get to know the other members.

Storming

In this stage, conflict and competition begin to emerge, as people discover that not everyone in the group has the same way of approaching a task. Relationships and personality styles start to affect the group dynamic. The need to compromise and find consensus with people who have different beliefs can be a difficult process. The more outgoing types will tend to dominate the discussion and the more thoughtful, reserved people may withdraw from participation. There may be many discussions about leadership, structure, rules etc. People are still not adept at listening to others.

Norming

In the third stage, the group begins to become more cohesive. The process becomes more inclusive and focuses on common goals, rather than individual agendas. Members listen more attentively to others’ opinions and actively ask questions of each other. People are more willing to share their true feelings, and leadership becomes more shared. There is more of a feeling of belonging and a desire to resolve conflict. These improved dynamics allow for more creativity and willingness to take risks.

Performing

Not every group gets this far! This is a truly inter-dependent stage with a high level of cohesion and cooperation. People work easily in the large group as well as small subgroups. Problem solving occurs in a cooperative and effective manner, and the group can be highly productive. Members are both task-oriented and people-oriented. Experimentation is encouraged and people aren’t blamed if the result is less than expected.

Adjourning

Many groups complete their tasks and eventually disband. In such cases, there should be proper recognition given to all members for their time and efforts, some concluding comments or rituals and a chance to say “goodbye” and “thanks”. Surprisingly, this can be a difficult process for people in a well-performing group. Wrapping up a project can be difficult, and it’s important to take time to reflect on the group’s progress and to celebrate their accomplishments and achieve some degree of closure.

APPENDIX P

Talents Worksheet

Striving talents explain the "why" of a person, the source of someone's energy and ambition. A "need to be of service or a desire to be on center stage or a love of helping others are striving talents.

Thinking talents explain "how" a person operates, how she thinks, makes choices, comes to decisions. Thinking strategically, being open to surprises, or calm under fire are thinking talents.

Relating talents put people into the equation. They explain "who" you trust, make friends with or avoid. Believing that "trust must be earned" is a relating talent; so is "avoiding confrontation."

My Striving Talents	My Thinking Talents	My Relating Talents
A Staff Member's Striving Talents	A Staff Member's Thinking Talents	A Staff Member's Relating Talents

APPENDIX Q

Lookers and Runners

General Directions:

Tell group that they are going into an exercise designed to bring out many dynamics of teams. They will experience the stages of team development along with the feelings around being a member and/or leader of a team.

Set up room (see schematic) and put group members into their respective teams. Spend time in advance selecting the team members for each team. You will need 5 to 6 team members for each team. Explain the objectives. As you select team managers you will want to select three basic personality types:

1. A take charge type - look to team with others of a similar personality type.
2. A passive type - team with go getters who will look to take over the team.
3. A team player type - team with others of a similar nature so that team has a chance for success.

Handout the Lookers and Runners rules sheet. Give self stick labels with the roles listed to the person who will be the manager of the team. Each team member will wear the label giving their assignment.

Read the instructions but do not offer any further explanation of the rules. The model must be exact in its construction. The instructor is the final judge.

Once the exercise begins the only response to any questions asked is "Unless it is expressly prohibited it is allowed."

Use 3 sided exhibit boards as the barriers set up at each work table and at the display table where the model will be displayed.

The model is made of Lego parts and should be glued together to allow for stability of the model. Have duplicate parts in plastic bags which will be given to the suppliers when the builder is seated behind their barrier. Have at least one bag of parts that are slightly incorrect (do not make the difference obvious perhaps two small red pieces in place of one large red or two green feet instead of one yellow/one green) so that one team is set up to fail from the beginning because they will never be able to exactly simulate the model due to a lack of appropriate tools. Teams are often set up to fail because they do not have the appropriate tools to work with but you will find that even if a team realizes they do not have the right parts they will always continue the exercise working just as hard as those who have the correct parts available for use.

Allow about 15 to 20 minutes for the exercise. During the exercise have loud music playing. This is meant to be a distraction and even if asked to turn the music down it is important not to do so. We start with Paul Simon's "Call me AI" and play the rest of that side of the Graceland tape. This simulates the often difficult, pressure creating conditions that we make our staff work under.

During the exercise call out the time remaining in a loud voice to simulate the time pressure that we place on our staff to get the task done.

If there are only 5 team members then the Supplier and Looker role can be assigned to the same person. If there are more than 6 team members on a team then you may use "Assistant Manager, Assistant Builder" positions.

After the exercise, have the teams stay in place for the following discussion:

Ask each team member how they felt about their roles. Start with suppliers on each team then move on to feedbacker, runner, looker, builder and managers.

Ask what contributed to the teams success and what gave the most difficulty to each team group.

Ask how the team members felt about the communication process during the exercise.

Ask what are the parallels between this exercise and the real world. The directions are set up to tell team members what they can *not* do but do not list all that they are able to do. This is important to discuss as the restraints many of the teams place on themselves are self imposed.

Ask what important lessons can be applied to the real world from this exercise.

We create an atmosphere of competition by telling the teams they are competing for a prize of immeasurable value. As we have never had a team complete the model we usually give out seed packets as a gift to the team with the incorrect parts who were set up to fail.

QUESTIONS:

1. To what did you attribute your success? (To winners)
2. What gave you the most difficulty? (To losers)
3. How did you feel about the communication process during the exercise?
4. How did you feel about your role?
5. Any parallels between this game and the real world in the organization in which you work?
6. What stage do you think your team developed to?
7. Based on this game, what important lessons can be applied to the real world?

APPENDIX R

The Eden Alternative Ten Principles for Staff

1. The three plagues of isolation, helplessness, and burnout account for the bulk of suffering among staff working at all levels in a Nursing Home.
2. An empowered community commits to creating a Human Habitat where work revolves around close and continuing contact with elements of humanity. It is these relationships that provide all employees with a pathway to fulfillment in their work.
3. Empathic leadership is the antidote to isolation... Employees deserve easy access to human compassion and companionship of leaders.
4. An empowered culture creates opportunity to give as well as receive knowledge. This is the antidote to helplessness.
5. An empowered culture imbues daily work with variety and spontaneity by creating an environment in which unexpected and unpredictable interactions and happenings take place, where support for emotionally difficult work exists, and where empowerment, education and creativity act as essential antidotes to burnout.
6. Mundane task-oriented activity dulls the spirit of nursing home staff. The opportunity to do things that staff members find meaningful is essential to employee morale and cultural health.
7. Administrative policies, procedures, and rules should be the servant to employee management and workplace culture, never its master.
8. An empowered culture honors its staff by de-emphasizing top-down bureaucratic authority, seeking instead to place the maximum possible decision-making authority into the hands of *all* staff.
9. Creating an empowered workplace culture is a never-ending process. Human growth must never be separated from the work to which staff commit themselves.
10. Wise and compassionate leadership is the lifeblood of any struggle against the three plagues of staff. For it, there can be no substitute.

APPENDIX S

Active Listening Exercise

Background

Who is the person who controls a two-way conversation? Most people would immediately say it's the speaker, and that people who tend to dominate conversations are usually in control. However, this exercise may shed new light on the dynamic.

Exercise – Part I

Pair off with a partner. You do not have to know this person well. One person in each pair will start as the "Speaker" and the other as the "Listener". The Speaker will be asked to think about a question that has some personal importance to them. A good example would be "What is the most rewarding part of elder care?" Another would be "What is the biggest challenge in your job?" A third possibility would be "Relate an experience that impressed you strongly about an elder's values." (The goal is to pick a question that elicits a serious and heartfelt response from the Speaker.) The facilitator should choose one of these, or a similar question, and have each Listener ask their partner the question directly.

Each Speaker should give a brief (1-2 minute) answer to the question directly to his/her Listener. *However*, during this answer, the Listener should be completely inattentive – look all around and avoid eye contact, look at your watch, roll your eyes or yawn, get distracted by other conversations around you, etc.

Call time after 2-3 minutes and ask a few Speakers to relate how it felt to offer their thoughts to their partner when they were being ignored.

Exercise – Part II

Have the Speakers answer the same question again. This time each Listener should pay complete attention to what is being said – make eye contact, give understanding nods or other body language to indicate interest and empathy. Remember to:

- Look at the other person. Focus on what s/he is communicating in words, gestures, body language, tone of voice. What emotions are you picking up? Is the person nervous, excited, happy, relaxed, hostile?
- Without seeming mechanical, echo back what you hear, as in: "it sounds like you're excited about your new job," or "this assignment really has you worried." If the emotions you hear conflict with the words, echo back the feelings: "You sound anxious," "frustrated," "tense," or whatever you hear.
- Then listen again. If you've reflected clearly, the person will agree with you and continue. If not, s/he will clarify the message. Either way you can check your understanding.

- Resist the temptation to talk, to share stories with the other person. Remember your role is to listen.
- Keep listening, watching for body language, and respond when appropriate. If the person is wringing their hands or bouncing their leg, echo back potential feelings? “You seem tense,” or “agitated by this today.”
- When the process seems complete – when the person has reached a new insight, decided to take action, or thanked you for your concern – conclude your listening.

Ask a few Speakers to relate how the experience was different this time.

Exercise – Part III

Repeat Parts I and II with another question, with the roles reversed in each pair, so that each person can experience how it feels to be on both ends of the interaction.

Ask the group once more who controls a conversation. Most will now say it's the listener, *not* the speaker.

Learning Objective

Communication is never a one-way street, even if one person does most of the talking. Always be aware of how we interact with others, and what our body language says about whether we value their comments. Our attention to others' opinions reflects our degree of respect for them as an individual. Negative responses can create significant barriers to communication and respect in the workplace, especially with your subordinates.

APPENDIX T

Test of Integrity - Matching

Inner World

- Why did you choose elder care?
- Why did you choose (place of work)?
- What do you hope to accomplish in your work?
- How would you like to be remembered at (place of work) after you leave? What have you done that will increase the likelihood of you being remembered this way?
- Rewrite the values here that you selected previously as being most important to you:
- What is hardest about your job? How has this affected you and therefore others?
- What is the most frustrating part? How has this affected you and therefore others?
- What is the most rewarding part? How has this affected you and therefore others?
- Are you generally happy at work? Sad? Stressed? Angry? What happens to you when you are happy at work? Sad? Stressed? Angry? How are you influenced by your emotions? How does this affect others?
- Are you happy with your life currently? How do you express this?
- What are your other interests? Give an example of how you have balance in your life.

Outer World

- What would you like your supervisor to say about you in an evaluation?
- What would you like your supervisees to say about you in an evaluation?
- How should your supervisor treat you when you succeed? When you make a mistake?
- How do you treat your employees when they succeed? When they make a mistake? Give a specific example of a time when you reacted appropriately. Inappropriately.
- How do you communicate thanks and appreciation? Give both positive and negative examples of this.
- How do you communicate displeasure? Give specific examples, both positive and negative, from your experiences.
- How do you handle stress coming from outside of work? Give an example of a stressful situation in your life and how you handled it.
- How much does staff know about you as a person, outside of your job description? What parts of you are you less willing to share? What parts of you are you more willing to share? Why?
- Do you feel you can express all of your true self when you are at work? If not, what holds you back? If so, how do you know you're expressing your true self?

APPENDIX U

Evaluation

Please Comment on the following:

1. Was this You Grow First training helpful to you?

_____ Yes _____ No

Please explain why:

	Exc.	Good	Fair	Poor	N/A
Overall Quality of Content					
Overall Presentation					
Learning Environment (able to see, hear, etc.)					
Opportunity to ask Questions					
The training provided an opportunity for personal growth					
The training provided clarity/understanding of the changing role as Eden Manager					
The training provided insight into how your values, beliefs, constructs, and experiences affect your role as an Eden Manager					
The training provided insight into how personalities affect group performance and your responsibility in creating group cohesiveness					
The training provided practical tools directly related to your changing role as an Eden Manager					

2. What did you learn about yourself from You Grow First that you didn't expect?

3. What did you learn about another member of your training group from the You Grow First training that you didn't expect?

4. In what way do you anticipate You Grow First will allow you to grow in your position?

5. Please feel free to offer any comments, questions, or suggestions regarding You Grow First.

APPENDIX V

IRB Approval Documentation



UNIVERSITY of NEW HAMPSHIRE

November 3, 2005

Jennifer Horton
Education, Morrill Hall
315 Pinebrook Drive
Rochester, NY 14616

IRB #: 3540
Study: A Model Leadership Curriculum for Managers in an Eden Alternative
Nursing Home
Approval Date: 11/03/2005

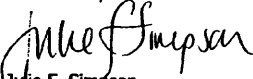
The Institutional Review Board for the Protection of Human Subjects in Research (IRB) has reviewed and approved the protocol for your study as Expedited as described in Title 45, Code of Federal Regulations (CFR), Part 46, Subsection 110.

Approval is granted to conduct your study as described in your protocol for one year from the approval date above. At the end of the approval period, you will be asked to submit a report with regard to the involvement of human subjects in this study. If your study is still active, you may request an extension of IRB approval.

Researchers who conduct studies involving human subjects have responsibilities as outlined in the attached document, *Responsibilities of Directors of Research Studies Involving Human Subjects*. (This document is also available at <http://www.unh.edu/osr/compliance/irb.html>.) Please read this document carefully before commencing your work involving human subjects.

If you have questions or concerns about your study or this approval, please feel free to contact me at 603-862-2003 or Julie.simpson@unh.edu. Please refer to the IRB # above in all correspondence related to this study. The IRB wishes you success with your research.

For the IRB,


Julie F. Simpson
Manager

cc: File
Janet Falvey

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