**OBSERVATIONS**

**Instructions:** Ask a team member to observe life in the home at various times throughout the day and document observations. If **NO** is marked, comment on the specific observation in comment section below.

<table>
<thead>
<tr>
<th>Observations</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Were residents observed participating in chores?</td>
<td></td>
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<tr>
<td>2 Were residents observed helping others?</td>
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<tr>
<td>3 Were residents observed engaged in meaningful activity?</td>
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**Comments:**
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Discuss the findings of the audit as a team. Any “No” response *could* indicate an area of concern during your evaluation. Review the criteria for this core and discuss your current practices to see if they meet the criteria for this core. If not, discuss changes that may need to be made.
**DOCUMENT REVIEW**

**Instructions:** Review the interview tool used to gather information about resident’s relationships and connections with people in the external community and answer the question below.

<table>
<thead>
<tr>
<th>Question</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Do interview tools ask questions about resident’s relationships with people in the external community?</td>
<td></td>
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<tr>
<td>2 Do interview tools ask how the team can support the resident in maintaining the relationships they wish to continue?</td>
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</tbody>
</table>

**Instructions:** Review a few care plans and answer the question below.

<table>
<thead>
<tr>
<th>Question</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Do care plans address strategies to support residents in maintaining relationships with those outside the home? (Assisting with phone calls, letters, social media, providing transportation, hosting meetings, etc.)</td>
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</tbody>
</table>

**Instructions:** Review the posted activity calendar and answer the questions below.

<table>
<thead>
<tr>
<th>Question</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Does the posted activity calendar(s) include opportunity for volunteer experiences?</td>
<td></td>
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<tr>
<td>2 Does the posted activity calendar(s) include opportunity for involvement with the local community outside of the home?</td>
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**Notes:**
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RESIDENT INTERVIEWS

Instructions: Ask a team member to interview a few residents and ask the questions below.

Supporting Practice #1- Internal Community

- How are you involved in deciding what goes on here? (Activities, events, etc.)
- What do you do when you have a complaint?

Supporting Practice #2- External Community

- How are you involved in the local community outside the home since moving to the nursing home?
- How is your family involved in your life here?
RESIDENT INTERVIEW FOLLOW-UP

Once resident interviews are complete, review the responses. Responses other than the following examples could indicate an area of concern.

Supporting Practice #1- Internal Community:

- **How are you involved in deciding what goes on here? (Activities, events, etc.)**
  Residents report there are opportunities beyond the monthly Resident Council meetings to be involved in daily decisions made in the home. (Activity planning sessions, Participation in hiring decisions, Involvement in making selections for purchases, etc.)

- **What do you do when you have a complaint?**
  Residents report they have regular opportunities to express concerns/complaints beyond the monthly Resident Council meetings. Residents report staff are responsive to their complaints/concerns.

Supporting Practice #2- External Community

- **How are you involved in the local community outside the home since moving to the nursing home?**
  Residents report they have been supported in maintaining their community connections as desired.

- **How is your family involved in your life here?**
  Residents report their family feels welcome and supported by the home.

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**TEAM INTERVIEW**

**Instructions:** Gather team members from different areas of the organization to discuss the following questions. Be sure to include direct caregivers in this discussion. Any “No” response could indicate an area of concern during your evaluation. Review the criteria for this core and discuss your current practices to see if they meet the criteria for this core. If not, discuss changes that may need to be made.

<table>
<thead>
<tr>
<th>Supporting Practice #1- Internal Community</th>
<th>Question</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Are residents in the home actively engaged in chores they want to help with or complete themselves?</td>
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<tr>
<td>2</td>
<td>Do staff talk with residents about things they want to do themselves and things they want help with?</td>
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<td>3</td>
<td>Do caregivers actively look for opportunity to engage residents in chores?</td>
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<td>4</td>
<td>Do residents in the home serve in any volunteer roles?</td>
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<td>5</td>
<td>Does the team actively work to facilitate volunteer opportunities (helping others) for residents?</td>
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<td>6</td>
<td>Are residents actively engaged in daily decisions made in their home? (For example: Decisions about hiring, purchases, staffing, décor, furniture placement, menus, activities, etc.)</td>
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<tr>
<td>7</td>
<td>Do formal opportunities exist beyond monthly Resident Council meetings to discuss such decisions with residents?</td>
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<tr>
<td>8</td>
<td>Do residents have formal opportunities beyond monthly Resident Council meetings to voice ideas, opinions and concerns?</td>
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<tr>
<td>9</td>
<td>Do formal opportunities exist for residents who do not attend group activities to voice ideas, opinions and concerns?</td>
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### Supporting Practice #2 - External Community

<table>
<thead>
<tr>
<th>Question</th>
<th>YES</th>
<th>NO</th>
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<tbody>
<tr>
<td>1. Does the home ask questions about who the resident has relationships or group affiliations with in the external community and which of those relationships or affiliations they wish to maintain?</td>
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<tr>
<td>2. Does the home record this information to share with team members in some way?</td>
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<td>3. Does each resident have a person-centered care plan that includes strategies to support individual preferences to maintain external relationships?</td>
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<td>4. Are residents supported by the home as outlined in their person-centered care plans in maintaining external relationships?</td>
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<td>5. Does the home make efforts to encourage people who are important to the current residents, to visit the home?</td>
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<td>6. Does the team make efforts to help the residents host others in the home?</td>
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<tr>
<td>7. Do current residents host any outside community meetings or groups in their home?</td>
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<tr>
<td>8. Have residents been actively engaged in community life outside the home during the past PEAK year?</td>
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<td>9. Does the team talk with residents regularly about what is going on in the community to discuss possible interest in participation?</td>
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<tr>
<td>10. Has the home been involved in community projects in the past PEAK year?</td>
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