

# PREFERENCE ASSESSMENT | 1: HOW TO GET STARTED

Phrased in clear, conversational language and tested with older adults, the **Preferences for Everyday Living Inventory (PELI)** helps to identify nursing home residents' authentic desires. Staff can use the questionnaire to learn about resident preferences and to personalize and improve the quality of care.

## STEP 1: FORM A CORE TEAM TO KICK OFF INITIAL EFFORTS

Pilot a roll out of the *PELI* assessment by selecting a **champion** and **team members** who work in social services, therapeutic recreation, life enrichment, community coordination, or nursing at your facility.

Champions or task force members should be:

- ✓ Passionate about honoring resident preference and choice
- ✓ Able to develop and use tracking systems such as spreadsheets
- ✓ Able to serve as effective leaders
- ✓ Willing to identify areas of weakness
- ✓ Working closely with the employees who will conduct resident interviews
- ✓ Eager to seek continuing education opportunities

Consider asking for **self-nominations** or for staff and administration to nominate potential members.

## STEP 2: SELECT INTERVIEW QUESTIONS & CREATE INTERVIEW FORM

Team members can use **any of three approaches to decide which *PELI* questions to ask** residents:

1. From the 72 questions in the full *PELI*, select 10-15 to ask in the pilot phase of *PELI* implementation, *or*
2. Focus on the 16 *Minimum Data Set 3.0 Section F* preference items, and ask follow up questions in the full *PELI*, *or*
3. Have departments divide up the 72 *PELI* questions by discipline and, as a team, decide on the items to ask.

Consider:

- Starting with a **positive focus** and select questions for which you anticipate possible solutions. For instance, asking “How important is it to you to listen to music you like?” may reveal preferences your organization can easily meet.
- Selecting questions on a **topic of particular concern**. In this way, use the *PELI* to gather needed data on preferences that are more challenging to address and to obtain ideas for solutions.
- Creating a paper or electronic document with the 10-15 questions selected by your team to record resident data.

The *MDS 3.0 Section F - Preferences for Customary Routine and Activities* will trigger additional assessment questions when residents say that activities are important, but they cannot do them. If a resident says an activity is “**Important**” or “**Important, but can't do**,” the full *PELI* contains follow-up questions that help staff learn more, and devise ways to fulfill the preference through the plan of care.

## STEP 3: SELECT & TRAIN INTERVIEWER(S)

**Interviewers** may be activity professionals, nursing assistants, or social services staff, or volunteers trained to fit your community's needs and resources. Begin *PELI* interviews with long-stay residents, asking questions either in one sitting or over a series of conversations. For residents who are unable to communicate, interview a family member or close friend who can speak on the resident's behalf and who knows his or her preferences well. (Also, see *Interview Tips*.)

## STEP 4: USE ASSESSMENTS TO INFORM CARE PLANNING MEETING

*PELI* offers a way to discover **each resident's unique interests and passions**. Discussing preference results during care planning meetings helps to create successful care plans and build relationships with residents.