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 serve as effective leaders
- Working closely with the employees who will conduct resident interviews
- Able to develop and use tracking systems such as spreadsheets
- Willing to identify areas of weakness
- 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.

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