Phrased in clear, conversational language that has been tested with older adults, the Preferences for Everyday Living Inventory (PELI) helps to identify nursing home residents’ authentic desires. The survey has been scientifically validated and includes questions that elicit insights about daily preferences, such as what time individuals like to wake up, take a shower and get dressed as well as the recreational activities they enjoy. Using the questionnaire helps staff learn about resident preferences in order to improve the quality of care.

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

Begin a simplified rollout of the PELI assessment by selecting a champion and team members who work in social services, therapeutic recreation or nursing at your facility. Choose a champion who:

- Can serve as an effective leader for this initiative.
- Works closely with the employees who will conduct resident interviews.
- Has the ability to develop and use tracking systems such as spreadsheets, is capable and willing to identify areas of weakness and is eager to seek continuing education opportunities.

While the champion doesn’t need to be a senior manager or supervisor, he or she should be able to provide training and skill development support to all involved employees.

**STEP 2: SELECT INTERVIEW QUESTIONS AND CREATE INTERVIEW FORM**

Team members should begin by reviewing the 72 questions in the full PELI and selecting a set of 10 to 15 questions to use in the initial effort of the PELI at your organization.

- To start with a positive focus, select questions about topics for which you anticipate possible solutions. For instance, clients’ answers to the question: “How important is it to you to listen to music you like?” may reveal preferences your organization can easily meet via music services.
- Alternatively, use the PELI to gather needed data on preferences that are more challenging to address. To obtain useful information for possible solutions, select questions on a topic of concern at your organization.
- Create a document with the 10 to 15 questions selected by your team. Print response options in a large font on a response card or single piece of paper that can be handed to residents during interview. (When you move toward full implementation, you may easily add or remove questions.)

Note that each question in the Minimum Data Set 3.0 Section F has at least one related question in the PELI. Though both measure similar areas of preference, 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 PELI-Full form contains follow-up questions that help staff learn more, and devise ways to fulfill the preference through the plan of care.

**STEP 3: SELECT AND TRAIN INTERVIEWER(S)**

Options for who conducts the interview: activity professionals or nursing assistants. Volunteers can be trained to fit your community’s needs and resources. Begin your tailored PELI interviews with long-stay residents. Interviews can occur 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.

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

Discussing preference results during care planning meetings helps direct care staff members build relationships with residents and create successful care plans. The PELI offers a consistent way to discover each resident’s unique interests, passions and preferences. Using the tool establishes a common understanding of each person’s wishes for daily life.