ABOUT THE TRAINING VIDEO

A preference interview is the foundation for person-centered care planning. Yet, what happens when residents are unable to share their preferences due to advanced cognitive impairment or communication challenges? *Engaging Family and Friends to Assess Preferences* is a 35-minute training video that walks care team members through the process of engaging a proxy – a family member, close friend or staff member who knows the resident well – in providing information about a resident's preferences for daily living.

The video shows how to:
- Decide when to involve a proxy and identify the best person to interview
- Conduct a PELI interview with a proxy
- Guide the conversation when a proxy shares what THEY would prefer for a loved one, rather than focusing on the resident's own preferences
- Engage staff to provide insight when family or close friends are not available

The video also highlights how direct care staff can sometimes provide specialized information that a family member or friend may not have -- for example, about a resident's personal care preferences. It is always best to ask residents directly about their preferences for daily living, but this video demonstrates effective strategies for assessment when a resident interview is not achievable.

WHO IS THIS VIDEO FOR?

The training video is geared to a diverse audience:
- Administrative staff
- Directors of nursing/unit managers
- Direct care workers (CNAs)
- Social workers
- Activity directors
- Dietary managers

DISCUSSION QUESTIONS

The video is designed for flexibility. Team members can view it uninterrupted, or the facilitator may pause the video at recommended intervals to allow for dialogue along the way. The questions suggested below aim to prompt thought, conversation and action that will help transform the vision of preference-based care into everyday reality for residents. Feel free to adapt the questions to meet your organization's needs.

Before watching the video, ask the group:
1. What are our organization's values regarding person-centered care?
2. In our community, how do we currently collect information about resident preferences?
3. Do we have a process to learn about preferences when residents have cognitive impairment? If so, what is it?
4. When we cannot learn about preferences directly from the resident, do we engage proxies?

Scene 1: Attempting to engage the resident in a preference interview
1. Tim talked to Ryan about his difficulty learning about Mr. Harris's preferences. Do team members in our community know who to talk with about next steps when preference interviews with residents are unsuccessful? (4:10)
2. Who conducts preference interviews in our community? (5:10)
3. When the five PELI response options were confusing for Mr. Harris, team members tried to simplify the response options to "Important" and "Not important." What strategies do we use to discuss preferences with residents who may have some cognitive impairment? (7:09)
4. Tim mentioned several steps his team took when Mr. Harris's first interview was unsuccessful. What steps do we follow if we are unable to gather preference information the first time we try? (8:10)

Scene 2: Contacting the proxy

1. Ryan checked with Morgan, who often works in Mr. Harris's neighborhood, to figure out which family member might be a good proxy. How do we identify which proxies are best to engage? (10:50)
2. What is our process for contacting proxies and scheduling interviews? (10:52)
3. Do we use more than one method to communicate with proxies (e.g., phone or in person)? If so, what are the reasons? (11:56)
4. In our community, who takes charge of communicating with proxies? Do we involve more than one person? (11:56)

Scene 3: Interviewing the proxy

1. Who in our community is trained to collect preference information from residents and proxies? (13:42)
2. How do we explain the purpose of the PELI interview to a proxy who does not understand the importance of learning about resident preferences? (15:51)
3. Notice how Tim simplified the response options when James felt overwhelmed by them. Discuss what we do when a proxy finds the preference interview overwhelming. (17:57)
4. How do we handle the situation when a proxy expresses his or her own preferences for the resident -- rather than focusing on what the resident may actually like and dislike? (19:53)
5. Have we ever encountered a proxy who thinks the resident's limitations will prevent them from engaging in a preferred activity? If so, how did we handle the situation? (23:33)
6. Tim explained that a PAL Card helps to communicate Mr. Harris's preferences. What tools do we use to share a resident's preferences with staff and visitors after the information has been collected? (25:04)

Scene 4: Interviewing a staff member

1. Morgan and the other direct care workers had been writing notes about Mr. Harris's preferences. Do the direct-care staff members in our community use any informal methods of recording residents' preferences? If so, how could we incorporate these techniques into our process for collecting preference information? (28:04)
2. Morgan noted that Mr. Harris seemed happier when the care team played music during his morning and evening routine. Discuss times when residents express their likes or dislikes through their emotions rather than words. How did we know the resident was enjoying, or not enjoying, the experience? (30:34)

After the video:

1. What questions do we have about engaging proxies in preference interviews?
2. How do we incorporate preference information into care planning, particularly for residents with some cognitive impairment?
3. What barriers might we run into when we work with proxies to collect preference information? What strategies could help overcome the barriers?

FOR MORE INFORMATION…

- *PELI Tip Sheet: Working with Proxies* – outlines steps to conduct successful proxy interviews.
- *Brochure about preference-based care* – explains the importance of preference-based, person-centered living.
- *PAL Card instructions and template* – provides a simple tool to share resident preferences across the care team.

Visit our website at PreferenceBasedLiving.com for additional resources.
Have questions or comments? Please e-mail us at PELI-Can@miamioh.edu or call our helpline at 513-529-3605.