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Sample Worksheet for *PELI-PIP*
PELI Performance Improvement Project

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Community Name and Location:

PDSA Cycle #   Start date: End date:

Objective of this cycle: Plan and execute a Performance Improvement Project aimed at improving our ability to assess and honor resident preferences.

This cycle will be used to: X Develop   X Test   X Implement a change

PLAN	Briefly describe the change you are planning. (Or: What are you trying to accomplish?):
	Assemble a committee that will develop a practical work plan to assess resident preferences using the *Preferences for Everyday Living Inventory (PELI),* as well as integrate preferences into care plans.
	Prediction: What do you think will happen? Why?
	The team will:
	• Learn about preference-based care as a core element of person-centered care.
	• Review published material and videos on preference-based care.
	• Learn how to use the PELI preference assessment instrument.
	• Analyze how well our community currently assesses and honors preferences.
	• Develop a specific plan for a pilot test, including aims, structure, communications, training, staffing, reporting and commitment.
	What data will you need to test your prediction/s? How will you collect it?
	Our documents will show that:
	• A team report lists the specific steps for our pilot-test, which uses new practices to improve preference assessment and fulfillment.
	• We have submitted our plan for approval to the community QAPI committee and leadership and it is ready for initial implementation.
	Preparation: Tasks to be done, person/s responsible, when/where/how:
	• Identify a leader and convene a team of interested participants to be charged with this project. The committee will include representation from stakeholders (at least one from each relevant department) as well as a resident and family member – By *[insert date]* – Community leadership
	• Schedule future meetings -- By *[insert date]* – PIP leader and team
	• Prepare agenda and gather resources for team education process – By *[insert date]* – PIP leader
	• Conduct a SWOT analysis to understand strengths, weaknesses, opportunities and threats in preference fulfillment in our community at present. – By *[insert date]* PIP leader and team

	- Based on SWOT analysis findings, team drafts a work plan that addresses: specific and measurable aims, target population, the proposed change in practice, methods for testing and roles for the staff members involved, and data collection to assess whether the change is producing the desired effect. – PIP leader and team -- By *[insert date]* - Present work plan for approval by community leadership and QAPI committee – -- By *[insert date] PIP leader and team*
DO	**Was the plan carried out?** _X_ YES **____** NO **What went well and what successes did you encounter?** After learning about the *PELI* and the importance of assessing resident preferences, the team crafted a plan to improve timeliness of *PELI* interviews as well as the frequency with which residents' preferences for wake-up times are honored. The team is excited about implementing the plan and knows challenges are ahead! **What problems or unexpected events did you encounter?** We experienced no significant problems during this phase largely because our senior management fully endorsed our committee's work and staff felt empowered to devote time to this important project. Top leadership will help us communicate the next phase of our PDSA efforts – pilot-testing the project on one neighborhood of our community. **Feedback and observations from the participants:** Participants are eager to get started on the next phase of our preference work: to conduct PELI assessments within 21 days of each resident's arrival in our community, as well as to increase our ability to honor each resident's preferred wake-up time each morning. We will experiment with preferred wake-up times in one neighborhood.
STUDY	**What does the data show?** Our SWOT analysis showed that we are not completing PELI assessments for new residents as soon as would be beneficial. Furthermore, residents have told us they would like more flexibility with wake-up times. Our staff, as well as resident and family member representatives, are enthusiastic about capturing resident preferences and honoring them more consistently than we do now. The group held three meetings and successfully created an action plan for our next PELI-PIP. The leadership of our organization has approved the plan. **Was your prediction confirmed? __X__ YES ____ NO** **What did you learn?** The process takes time and commitment but we believe it will yield important outcomes for our community.
ACT	**What will your action be? Will you: __X___ Adopt _____ Adapt ____ Abandon this change** Based on the success of our planning effort, we are ready to begin a new PDSA cycle aimed at improving our ability to complete *PELI* assessments within 21 days of a resident's move-in date, as well as meet resident preferences for morning wake-up times consistently. This project will begin in 10 days.