



Check List for Evaluating Retirement Communities

There sure are a lot of questions! But if you and your spouse are going to be living in one of these facilities having to rely on the staff and facility regulations to make your life pleasant, not only on a daily basis, but also in crises situations, these questions are well worth answering up front.

Take a pencil/pen, this list, and a pad of paper along with you. Make frequent notes. Ask lots of questions. Remember the only bad question is the one not asked.

Facility Name _____

Date of visit _____

Type of facility

- Continuing Care Retirement Community (CCRC)
- Assisted Living
- Independent Living
- Skilled Nursing
- What accreditations does the facility and/or its parent company have

Medical/Therapy Services Offered

- Memory Care – Alzheimer’s/Dementia Unit
- Respite
- In home care within Independent Living
- Speech Therapy
- Respiratory Therapy
- Rehabilitation
- Physical Therapy
- Occupational Therapy

Staff

- Staff turnover – ask how long various levels of staff have been at the facility on average. Three or more years is good.
- Do staff participate in continuing education
- Staff credentials – what credentials are required for various staffing positions including director and medical staff
- What is the resident to staff ratio in Assisted Living # Skilled Nursing #
- What medical professions are available on site
- MD RN LPN
- How are staff identified
- What hours are professional medical personnel available

- Is seating assigned
- Can you get snacks between meals
- Is there a charge for accommodating various special diets
- How many meal options are offered per meal – take a menu home if you can
- How convenient is vending including ice
- Where are meals served

Housekeeping Services

- Laundry – where are machines
- Trash disposal
- General maintenance costs and availability
- Is laundry service available
- General cleaning and housekeeping services
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Personal Services and Conveniences – Ask about costs/fees for each

- Beauty shop
- Dry cleaning
- Library
- Postal
- Convenience store
- Exercise room
- Laundry service
- Barber shop
- Shopping services
- Activities and clubs
- ATM
- Pool
- Walking trails
- Housekeeping service

Miscellaneous Questions

- Provisions for spiritual needs – chapel, clergy
- How available are newspapers
- Talk to several residents (male & female). Get their impressions, likes, dislikes. What would they change.
- How frequently, on average, are agreements as to living arrangements and meals changed by management
- What are the quiet hours
- Is there a resident council
- What pets are allowed
- How are residents monitored in terms of security and emergency needs
- What communications to they provide to keep residents current
- What is the parent company for the facility
- Accommodations for family visits
- What hours are visitors not permitted
- Is smoking allowed
- Ask about your ability to continue any hobbies or interests you may have

Your Observations and Investigation

- Is there an unpleasant odor in the rooms or premises
- Do the premises and common areas appear neat and clean

- Does the facility appear to be well-maintained
- Does the entrance appear to be secure
- Does the dining area look like a place where you could enjoy three meals a day
- Check or have your financial advisor check the financial stability of the parent company and/or local facility
- What was your tour like? Did they offer one or more meals? Were your needs looked after – convenient schedule, walking vs. riding, bathroom breaks, refreshments, independent investigation of grounds
- Did you have to ask these questions or did they have a handout prepared providing most, if not all the answers
- How convenient is facility for family and friends to visit
- How good is cellular reception for your carrier? (Look at the bars on your cell phone frequently in various locations on the premises where you might expect to be often.)
- Do common areas look inviting for chatting with other residents, greeting and/or entertaining guests, just relaxing out of your own room or living unit
- “Google” parent company and local facility to see what awards or problems come up
- Be sure you understand what happens to you and your investment if the company is sold and/or goes bankrupt
- How convenient are the various medical facilities you and your wife might be requiring
- Check with state and local authorities for problems with the parent company or facility
- How convenient for you is the parking

After all these questions and thinking through all the options, can you see yourself and your spouse being happy living here? That’s the big one!