

# Checklist for evaluating a retirement community

Choosing a continuing care retirement community that's right for you involves many factors. You'll be looking for a place that "feels right" — but don't depend on feelings alone...

This checklist includes the important factors to consider when comparing communities; it is a resource to help you look at facilities' strengths and weaknesses. Consider visiting two to three facilities, and use the same checklist to evaluate and make notes on each.

1. Print a copy of this list for each community you are considering
2. Fill it out during each visit
3. Compare your notes; discuss them with your family

Note: As you move toward a decision, visit again at different times of day to get an even better feel for the staff and care.

# Location and convenience

Is the facility convenient to:

- Family \_\_\_\_\_
- Friends \_\_\_\_\_
- Church \_\_\_\_\_
- Doctors \_\_\_\_\_
- Bank \_\_\_\_\_
- Shopping \_\_\_\_\_

Is a continuum of care offered so that you can age in place?

- Independent living — a self-reliant lifestyle including doing your own cooking  
Number of units \_\_\_\_\_
- Assisted living — meals included plus add-on services available to maintain maximum independence  
Number of units \_\_\_\_\_
- Skilled nursing — provides 24-hr. professional nursing care  
Number of units: \_\_\_\_\_

Is it affordable?

- Straight rental – price range \_\_\_\_\_
- Condo Ownership – price range \_\_\_\_\_
- Entrance fee – price range \_\_\_\_\_
- Pay for services – price range \_\_\_\_\_
- Are Medicare and Medicaid accepted? \_\_\_\_\_
- What happens to resident whose money runs out? \_\_\_\_\_  
\_\_\_\_\_

## Quality of care indicators

The quality of the people you live with and who care for you is often more important than the physical surroundings. Ask about the organization's:

- Religious affiliation \_\_\_\_\_
- Staff-to-resident ratio \_\_\_\_\_
- Average length of service of staff \_\_\_\_\_
- Reason for existing (profit or non-profit) \_\_\_\_\_
- Overall atmosphere \_\_\_\_\_
- Policy about on-going training for staff \_\_\_\_\_
- Policy on privacy and respect for residents \_\_\_\_\_
- Results on its last two state inspections \_\_\_\_\_

## The facility

Is the building safe and secure? Will it feel like home? Here are some factors to look for:

### Safety

- Fire retardant brick or concrete construction \_\_\_\_\_
- Windows in rooms/apts. that open easily \_\_\_\_\_
- Wheelchair accessible porches/outdoor areas/gardens \_\_\_\_\_
- Well-lit entrance that's accessible in all types of weather \_\_\_\_\_
- Fire alarms and smoke detectors throughout the building(s) \_\_\_\_\_
- Parking for residents \_\_\_\_\_

*Interior features...*

The facility should be bright, clean and sweet smelling. Here are some things to look for:

How recently has the building been remodeled? \_\_\_\_\_

**Lobby:**

- A homey feel \_\_\_\_\_
- Attractive décor \_\_\_\_\_
- Comfortable furniture \_\_\_\_\_
- Good lighting \_\_\_\_\_
- Artwork \_\_\_\_\_
- TV/video equipment \_\_\_\_\_
- Fireplace \_\_\_\_\_

**Dining areas:**

- A homey feel \_\_\_\_\_
  - Attractive décor \_\_\_\_\_
  - Comfortable furniture \_\_\_\_\_
  - Good lighting \_\_\_\_\_
  - Artwork \_\_\_\_\_
  - Room for wheelchairs and walkers \_\_\_\_\_
- Are they allowed in dining areas? \_\_\_\_\_

**Hallways:**

- Plenty of space for people and wheelchairs to pass
- Good lighting
- Handrails
- Color coding making it easy finding your way around
- Practical flooring for wheelchairs, walkers, etc.

*Residential rooms...*

Emergency call system in the:

- Bedroom
- Bath
- Living area
- Smoke detectors
- Door locks

Furnishings:

- Bright and clean
- Freshly painted
- Private
- Quiet
- Clean carpet/flooring
- Workable, insulated windows
- Nice view
- Drapes/blinds
- Individual control for air conditioning/heating
- Large bathroom with grab bars
- Convenient telephone jacks
- Cable TV hook up
- Ample storage

Does the space accommodate wheelchairs/walkers?

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Will you be able to decorate with your own things?

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Easy access to:

- Elevators
- Dining areas
- Laundry

## Services

Are these services available?

- Housekeeping: How often for what fee? \_\_\_\_\_
- Personal laundry: How often for what fee? \_\_\_\_\_
- Linen service: How often for what fee? \_\_\_\_\_
- Transportation: How does it work? \_\_\_\_\_

Food service

*Ask for sample menus. If possible, eat a meal there before making your final decision.*

- Meals well-balanced and appetizing \_\_\_\_\_
- Choices for entrees and amounts of food \_\_\_\_\_
- Meals served hot \_\_\_\_\_
- Special diets and dietary requests accommodated \_\_\_\_\_
- Menus supervised by registered dietician \_\_\_\_\_

What are the hours of operation? \_\_\_\_\_

- Snacks available? \_\_\_\_\_
- Guests and family members welcome? \_\_\_\_\_

What does the food plan include? \_\_\_\_\_

\_\_\_\_\_

## How are meals served?

- Buffet style \_\_\_\_\_
- Served by wait staff \_\_\_\_\_
- Open seating or assigned places \_\_\_\_\_
- Tray service in rooms available \_\_\_\_\_
- Second helpings or smaller portions available \_\_\_\_\_
- Wheelchairs and walkers allowed in the dining room

## Social activities

Here are some activities that may be offered. Check what's available and how it compares with your interests.

- Exercise or wellness program \_\_\_\_\_
- Billiards \_\_\_\_\_
- Church services \_\_\_\_\_
- Bible study groups \_\_\_\_\_
- In-house library \_\_\_\_\_
- Access to public library \_\_\_\_\_
- Overnight guest rooms available \_\_\_\_\_
- Arts and crafts room \_\_\_\_\_
- Garden \_\_\_\_\_
- Computers \_\_\_\_\_
- Movies \_\_\_\_\_
- On-site speakers on current events \_\_\_\_\_
- Free on-site health screenings \_\_\_\_\_
- Music programs \_\_\_\_\_
- Month parties/special events \_\_\_\_\_
- Birthday parties for residents \_\_\_\_\_
- On-site educational classes \_\_\_\_\_
- Resident council governing body \_\_\_\_\_
- Intergenerational opportunities \_\_\_\_\_

*The quality of a program can often be judged by the number of people assigned to it.*

How many volunteers are involved with the facility?

\_\_\_\_\_  
\_\_\_\_\_

How many staff members are there in the activity department?

\_\_\_\_\_  
\_\_\_\_\_

**On-site conveniences**

- Chaplain \_\_\_\_\_
- Hair salon \_\_\_\_\_
- Laundry rooms \_\_\_\_\_
- Gift shop \_\_\_\_\_
- Postal center \_\_\_\_\_
- City bus service \_\_\_\_\_
- Convenient parking for residents and visitors \_\_\_\_\_

**Special services**

- Hospice care when needed \_\_\_\_\_
  - Help with dressing \_\_\_\_\_
  - Inoculations for flu, etc. \_\_\_\_\_
  - Pet therapy \_\_\_\_\_
  - Physical and occupation therapy available \_\_\_\_\_
  - Staff Aid to help recovering resident back to apartment with services \_\_\_\_\_
- \_\_\_\_\_

# Other factors

What details are important to you? Record your thoughts here:

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Again, it is wise to visit two to three facilities and use the same checklist to evaluate and make notes on each. As you move toward a decision, visit again at different times of day to get an even better feel for the staff and care.

Calvin Community welcomes your interest, and we hope you'll choose to come live with us. If we aren't your choice, however, please know we wish you peace and happiness in your new home wherever you choose to live.

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