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/apt. 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?

________________________________________________________________________

Will you be able to decorate with your own things?

________________________________________________________________________
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:

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

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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