

Senior Living Community Checklist

Community Name:

Community contact person name and number:

Personal Fit Rating (1 = Poor, 5 = Ideal)

1 2 3 4 5

General Information:

- ☐ How long has the community been open?

- ☐ Is it not-for-profit or corporately owned?

- ☐ Are they affiliated with churches, universities, or other organizations?

Management Operations

- ☐ How long has the leadership been in place?

- ☐ Is there a resident council? What role do they play?

- ☐ What is the emergency plan for health crises, severe weather, & power outages?

Residences and Fees

- ☐ What types of units are available?

- ☐ Is there a waiting list? How does it work?

- ☐ What does the monthly fee cover (utilities, meals, housekeeping)?

- ☐ Are rent increases predictable?

Lifestyle and Amenities

- ☐ What dining options are available? _____
- ☐ What activities are offered on-site and off-site? _____

- ☐ Is transportation available? What are the costs? _____
- ☐ What is the pet policy? _____

Healthcare and Safety

- ☐ What levels of care are available (independent living, assisted living, memory care)? _____

- ☐ How are emergencies handled? _____
- ☐ What happens if a resident needs more care? _____

Observations to make during your visit

- ☐ Are residents engaged and friendly? _____
- ☐ Are staff members courteous and well-groomed? _____
- ☐ Is the community clean and well-maintained? _____
- ☐ Do the posted activities appeal to your interests? _____
- ☐ How is parking and traffic around the community? _____

My Notes
