

## Worksheet for Evaluating a Senior Living Community

Facility or Community: \_\_\_\_\_

Location: \_\_\_\_\_

Type of unit:  Studio  1-Bedroom  2-Bedroom  Other

Contact Person: \_\_\_\_\_

Phone/E-mail: \_\_\_\_\_

### Location

- Surrounding neighborhood is safe, attractive?
- Access to transportation, amenities, etc., is good?
- Location is convenient for family and friends?

**Evaluation:**  Excellent  Good  Acceptable  Unacceptable

**Notes:** \_\_\_\_\_

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

### Cost

- "Buy-in" investment, if any, is affordable?
- Monthly costs are within my/our budget?
- Things not included in the monthly rate have been taken into account?

**Evaluation:**  Excellent  Good  Acceptable  Unacceptable

**Notes:** \_\_\_\_\_

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

### Terms and Conditions

- Lease or rental agreement (including attachments) has been read and looks fair?
- Resident rules are OK, including rules on . . .
  - Pets?
  - Smoking?
  - Alcohol?
  - Visitors?
  - Absences due to hospitalization?
  - Other: \_\_\_\_\_

**Evaluation:**  Excellent  Good  Acceptable  Unacceptable

**Notes:** \_\_\_\_\_

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**Building(s) and grounds...**

- appear to be clean and well maintained?
- are senior-friendly and easy to get around in?
- have adequate parking?
- include amenities, such as:
  - exercise facility?
  - rooms for private meals and get-togethers?
  - computer center?
  - other: \_\_\_\_\_

**Notes:** \_\_\_\_\_

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**Evaluation:**  Excellent  Good  Acceptable  Unacceptable

**Services and support include...**

- housekeeping and laundry?
- dining room or meal plan?
- active social and recreation program?
- transportation?
- personal care and help with ADLs?
- health care services?
- other: \_\_\_\_\_

**Notes:** \_\_\_\_\_

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**Evaluation:**  Excellent  Good  Acceptable  Unacceptable

**The employees appear...**

- courteous, friendly, eager to help?
- neat, clean, well-groomed?
- adequately trained, good at what they do?
- above all, respectful of the residents?

**Notes:** \_\_\_\_\_

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

**Evaluation:**  Excellent  Good  Acceptable  Unacceptable

**The residents say...**

- they are kept well informed?
- staffing is adequate to meet their needs?
- issues, if they arise, are dealt with fairly?
- resident decision-making is encouraged?
- they would make the same choice again?

**Notes:** \_\_\_\_\_

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\_\_\_\_\_

**Evaluation:**  Excellent  Good  Acceptable  Unacceptable