

Independent Living Communities Checklist

Living Space and Accommodations

- _____ Do residents purchase or rent their apartments? What is the cost?
- _____ Are freestanding homes available?
- _____ What are the floor-plan options? Are balconies or patios available?
- _____ Are the apartments/homes furnished or unfurnished?
- _____ Do the apartments/homes include all-electric appliances, including refrigerator, dishwasher, oven, sink with garbage disposal, dishwasher, washer and dryer? Are light fixtures included?
- _____ Do the apartments/homes have individually controlled heating and air-conditioning?
- _____ Are window treatments provided?
- _____ What is the policy regarding personal belongings in the apartments?
- _____ What is the policy for overnight guests? Are guestrooms available? What are the guest fees?
- _____ Is additional indoor storage space available? Is there an extra fee?
- _____ Can residents have automobiles? Is parking assigned? Do residents pay a parking fee? Is a garage attached to the apartment/home?
- _____ Are patios and courtyards available for resident use? Is an area available for resident gardening?
- _____ Does the community provide 24-hour security?
- _____ Are pets allowed to reside in the residence? If so, are there additional fees or deposits? If not, are pets allowed to visit?

Staff

- _____ Ask about the community's staffing patterns and philosophy about staffing.
- _____ What training and qualifications are required for staff? Do staff members have ongoing training?
- _____ Observe staff and resident interactions. Are they positive? Courteous?

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- _____ Ask other residents whether staff members acknowledge visitors and/or provide assistance? Is the staff approachable?
- _____ Does the staff handle resident requests in a timely way?
- _____ Can private-duty companions be hired? What is the procedure for that type of service?
- _____ Does the facility have a volunteer program? If yes, what types of activities do the volunteers perform?
- _____ Ask other residents whether the administrator/director practices an “open-door” policy?

Services, Activities and Amenities

- _____ Does the community charge an additional fee for the services, activities or amenities offered?
- _____ Are physician services or therapy services available on site?
- _____ Are professional nursing services on site? If not, does the staff assist residents and families in making arrangements through a home health agency?
- _____ Does the community provide bed linens and towels?
- _____ Does the community provide laundry or housekeeping services?
- _____ Are beauty shop or barber services available on site?
- _____ Does the community provide interior and exterior maintenance of apartments, including upkeep of the lawn and snow removal of private roads and sidewalks in the community?
- _____ What recreational and spiritual activities are available? Obtain or review a copy of the activities calendar.
- _____ Is transportation provided for medical appointments and recreational purposes?
- _____ What are the suggestion or complaint procedures?
- _____ Are hospice care, therapy services or in-home care services offered? If so, does the community help coordinate that care?
- _____ What happens if a resident’s health care needs change? Under what conditions are residents asked to move if there is a change in health status?
- _____ What amenities are available for residents (i.e., swimming pool, library, fitness center, convenience store)?

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_____ Are cable TV and all utilities included in the basic monthly fee?

Moving In

_____ What does the moving-in process entail?

_____ What are the paperwork requirements and the timeframes involved?

_____ Does the community provide any assistance with moving in?

_____ How is the initial resident assessment managed? Who completes the assessment?

_____ Does the community subscribe to a set of resident rights and responsibilities? Ask for a written copy.

Costs and Fees

_____ Is there a basic monthly cost or homeowners' association fee? What services are included in the basic monthly cost or homeowners' association fee? Ask for a written copy.

_____ Does the community require an entry fee or initial investment? If so, is it comparable to that in other communities? Is the entry fee or initial investment refundable?

_____ If the apartment or home is purchased, can the residence be sold to another party or the community if the resident moves? What if the resident is transitioning to another level of care within the same campus?

_____ Does the community have a written schedule of fees for extra services? If so, request a copy.

_____ Under what circumstances might the fees change? How much notice is given if there is a fee increase?

_____ Is there a security deposit? What is the refund policy?

Dining and Food Services

_____ Does the community accommodate special diets?

_____ Does the community provide a meal-plan option?

_____ Are residents allowed to have guests for meals? Is there a fee?

_____ Can my family plan special occasions/meals in a private dining room?

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Safety

- _____ Does the community have a fire sprinkler system throughout the facility?
- _____ Where are the smoke detectors?
- _____ How often does the community have fire drills?
- _____ Does the facility have an emergency-preparedness plan?
- _____ How are emergency and evacuation plans reviewed with residents?
- _____ Are residents provided with some type of alarm or call bell in their apartment or home to alert staff on duty in emergency situations?

Complaints

- _____ Whom should I call with questions or complaints?
- _____ Is there a 24-hour telephone number I can call?