Community Touring Notes

When calling or visiting a prospective senior living community, use this checklist to keep notes, compare communities and get answers to important questions.

OBSERVATIONS	Community 1	Community 2	Community 3
You are greeted and feel welcome	Yes / No	Yes / No	Yes / No
Staff members are kind and caring to residents	Yes / No	Yes / No	Yes / No
Staff call residents by name	Yes / No	Yes / No	Yes / No
Staff and residents are well-groomed	Yes / No	Yes / No	Yes / No
Residents appear engaged and happy	Yes / No	Yes / No	Yes / No
Meals are nutritious and appealing	Yes / No	Yes / No	Yes / No
Residence is clean and scent-free	Yes / No	Yes / No	Yes / No
The layout and floor plan make rooms and communal spaces easy to find	Yes / No	Yes / No	Yes / No
There is a robust set of activities that your loved one will enjoy	Yes / No	Yes / No	Yes / No
Exits are clearly marked	Yes / No	Yes / No	Yes / No
Handrails are available throughout hallways	Yes / No	Yes / No	Yes / No
Temperature is comfortable	Yes / No	Yes / No	Yes / No
Lighting is good	Yes / No	Yes / No	Yes / No

SAFETY QUETSIONS	Community 1	Community 2	Community 3
Is an individual plan of care maintained for each resident?	Yes / No	Yes / No	Yes / No
Are the residents and families included in the process of preparing care plans?	Yes / No	Yes / No	Yes / No
Is there a physician who visits the facility regularly?	Yes / No	Yes / No	Yes / No
Can staff administer medications?	Yes / No	Yes / No	Yes / No

What is the policy for handling medical emergencies?
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_____
_____

What additional services are available if the needs of a resident change?
_____
_____
_____

Who coordinates outside care-provider visits?
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_____
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LEGAL AND FINANCIAL QUESTIONS	Community 1	Community 2	Community 3
Are there pricing incentives, move-in specials, or other financial enticements?	Yes / No	Yes / No	Yes / No
Are residents required to carry renter's insurance?	Yes / No	Yes / No	Yes / No
Is there an appeals process for dissatisfied residents?	Yes / No	Yes / No	Yes / No
Are the monthly fees negotiable?	Yes / No	Yes / No	Yes / No

Creating New Hope
Senior Living Advisors

How long is the wait-list?
_____
_____
_____
_____

How are the monthly fees charged and calculated?
_____
_____
_____
_____

Are there additional fees? If so, what are they?
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You've completed tours of some senior living communities -- now what? Share what you've learned! Engage with another family member to discuss each property, and call your Advisor to discuss which properties you like and how to handle the conversation with your loved one.

NAME OF COMMUNITY 1:	NAME OF COMMUNITY 2:	NAME OF COMMUNITY 3:
_____	_____	_____
_____	_____	_____
ADDRESS:	ADDRESS:	ADDRESS:
_____	_____	_____
_____	_____	_____
PHONE:	PHONE:	PHONE:
_____	_____	_____
_____	_____	_____
CONTACT PERSON:	CONTACT PERSON:	CONTACT PERSON:
_____	_____	_____
_____	_____	_____

NOTES:
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