

## **Independent Living Housing Checklist**

### **First Impression**

- Do you like the facility's location and outward appearance?
- Is the facility convenient for frequent visits by family and friends?
- Is the facility near a shopping and entertainment complex?
- Can the resident access a medical complex easily?
- Is public transportation available/accessible?
- Are you welcomed with a warm greeting from the staff?
- Does the staff address residents by their names and interact with them during your tour?
- Do you notice the residents socializing with each other and do they appear content?
- Can you talk with residents about how they like living there and about the staff?
- Is the staff appropriately dressed, friendly and outgoing?
- Do the staff members treat each other in a professional manner?
- Are visits with the residents encouraged and welcome at any time?
- What percentage of the apartments has been rented and is occupied?
- Is there a waiting list? If so, how long do they estimate it will be for a unit to become available?

### **Living Area and Accommodations**

- Have the common areas and apartments been designed to allow you to live as easily and independently as you would like? Is the floor plan well designed and easy to follow?
- Are doorways, hallways and rooms accommodating to wheelchairs and walkers?
- Are elevators available for those unable to use stairways and handrails to aid in walking?
- Are floors of a non-skid material and carpets conducive for safe walking?
- Does the residence have good lighting, sprinklers and clearly marked exits?
- Is the residence clean, free of odors and appropriately heated/cooled?
- Are the common areas in general attractive, comfortable and clean?
- Is there an outside courtyard or patio for residents and visitors and can they garden?
- Does the residence provide ample security and is there an emergency evacuation plan?
- Are there different sizes and types of units available with optional floor plans?
- Are single units available and/or double occupancy units for sharing with another person?
- Does residence have furnished/unfurnished rooms? What is provided or what can they bring?

- May they decorate their own rooms? Is there adequate storage space?
- Is a 24-hour emergency response system accessible from the unit with own lockable door?
- Are bathrooms private with handicapped accommodations for wheelchairs and walkers?
- Do all units have a telephone and cable TV and how is billing handled?
- Does kitchen unit have refrigerator/sink/cooking element and can food be kept in their units?
- May residents smoke in their units or are there designated public areas?

### **Moving In, Contracts, and Finances**

- What's involved with the moving in/out process?
- Is there a written statement available of the resident rights and responsibilities?
- Is a contractual agreement available that clearly discloses healthcare, accommodations, personal care, supportive services, all fees, as well as admission and discharge provisions?
- Find out what the payment schedule is and if residents own or rent their unit?
- How much is the monthly fee? How often can it be increased and for what reasons? Is there a limit on the amount of increase per year? What is the history on monthly fee increases?
- Are residents required to purchase renters' insurance for personal property in their units?
- Do billing, payment and credit policies seem fair and reasonable? May resident handle his/her own finances with staff assistance if able? Must a family member/outside party be designated?
- When may a contract be terminated and what are the policies for refunds and transfers? Is there an appeals process for dissatisfied residents?
- What happens if funds are depleted and full payments can no longer be made?
- Is there any government, private or corporate programs available to help cover the costs?
- What additional services are available if the resident's needs change? Is staff available to coordinate these services?
- Is there a procedure to pay for additional services such as skilled nursing care or physical therapy when the services are needed on a temporary basis?

### **Health/Personal Care/Services**

- Can the facility provide a list of available services and are residents and families involved in developing the service agreement? Who provides these services/what are their qualifications
- How are medical emergencies handled? Does the residence have a clearly stated procedure for responding to medical emergencies? Is there an arrangement with a nearby hospital?
- Is there a staff person to coordinate home care visits from a nurse, physical or occupational therapist, etc when needed on temporary basis?

- To what extent if any are medical services available, and how are these services provided?
- Are housekeeping, linen service and personal laundry included in the fees, or are they available at an additional charge? Are on-site laundry facilities available and convenient?
- Does the residence provide transportation to doctors' offices, the hairdresser, shopping and other activities desired by residents and can it be arranged on short notice?
- Are pharmacy, barber/beautician and/or physical therapy services offered on-site or nearby?

### **Social and Recreational**

- What kinds of group/individual recreational activities if any, are offered? Who schedules them?
- Is there an organized activities program with a posted daily schedule of events?
- Do volunteers and family members come into the residence to participate/conduct programs?
- Does the facility schedule trips or go to other events off premises?
- Do residents participate in activities outside of the residence in the neighboring community?
- Are the resident activity (social) areas appropriate and desirable to the prospective resident?
- Are there supplies for social activities/hobbies (games, cards, crafts, computers, gardening)?
- Are religious services held on the premises or arrangements made for nearby services?
- Are there fitness facilities, as well as regularly scheduled exercise classes?
- Does the residence create a sense of community by allowing residents to participate in certain activities or perform simple chores for the group as a whole?
- Are residents' pets allowed in the residence? Does facility have pets and who cares for them?

### **Staff**

- Ask about the residence's practices and philosophy regarding staffing.
- What are the hiring procedures and requirements for eligibility? Are criminal background checks, references, and certifications required?
- Is there a staff-training program in place and what does it entail?
- Is staff courteous to residents and to each other? Do they responses for assistance timely?
- Is the administrator, or appropriate staff person generally available to answer questions or discuss problems and would you be comfortable dealing with them on a daily basis?

## **Food**

- Does the residence provide any meals, if so how many times a day, how many days a week, and how does the menu vary from meal to meal?
- What about special diets; does a qualified dietitian plan or approve menus?
- Are residents involved in menu planning and may they request special foods?
- Does dining room environment encourage residents to relax, socialize, and enjoy their food?
- Are common dining areas available and when may residents eat meals in their units?
- Are meals provided only at set times or is there some flexibility? Are snacks available?
- How many meals are included in the fee? If a resident becomes ill, is tray service available?
- Can residents have guests dine with them for an additional fee? Is there a private dining room for special events and occasions, if desired?

## **Licensure and Certification**

- If the state requires the residence to be licensed, does it have a current license displayed?
- If the state requires the administrator to be licensed/certified, does she/he have a current license/certification?
- Is the facility a member of a trade or professional association?
- What reputation does the facility have in the community? How long has it been in business? Is it in good financial health? Does the facility follow generally accepted accounting procedures?
- If the facility is sponsored by a nonprofit organization and managed under contract with a commercial firm, what are the conditions of that contract?
- Is there a resident council or organization through which residents have a means of voicing their views on the management of the community?

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