

# Independent Living Checklist:

## *What To Ask & What To Look For*

Picking the right independent living community could be really stressful, so how do you know in advance which community is right for you? What may seem great for your friends may be too stuffy for you or too lively for you and vice versa. If you ask the enough questions and spend plenty of time visiting the communities, then you will know what feels right for you. To get started, below is a checklist of what you should research, ask on the phone, and what to look for when you visit.

1. Narrow the search by community and region:
  - Is the community within a community or town that you like and have heard good things about?
  - How far to the nearest airport, and is it an airport that has reasonably priced flights?
  - Is it convenient or friends and family to visit?
  - Is it an open or gated community?
  - Is it locally operated or part of a national or regional chain?
  - If part of a chain, is it well respected name to trust?
  - Is the area a safe area with a low crime rate? (use sites like Trulia, Neighborhood Scout, and Crime Reports to check safety and crime records.)
  - What is the cost, and is there a buy in fee?
  - Are there age restrictions at the community?
  - Is it close to restaurants, medical centers, shopping, and other services?
  - Is there a meal plan and is it flexible? If so, what are the dining facilities like?
  - Is it a continuum of care community? (Are there other care levels available like assisted living, if needed?)
  - What are the housing options and how will they suit your needs?
  - Check reviews: What comments and reviews are from the BBB, Area Agency on Aging, and Caring.com?
2. Ask when you call?
  - Are you accepting new residents?
    - If not, is there a wait list? How long is the typical waiting time? (Remember, most people will join the wait list on several communities, so it may be shorter than it seems.)
  - What are the services available for additional fees?
  - What services are included in the price?
  - Do you have transition process programs?
  - What type of payments do you accept?
3. Ask when you visit:
  - About the Community:

- Is the neighborhood pleasant and quiet?
- Is it easily accessed to public transportation?
- Is there covered parking? Is it free or an additional charge?
- Are the common spaces appealing and pleasant?
- Are the grounds and buildings clean, well maintained and spacious?
- How extensive are the outdoor areas for visiting, recreation, and exercise?
- How many rooms are available where you can visit with family and other residents?
- About living arrangements?
  - Are the accommodations including a variety of housing options, including studios and smaller apartments if you want to downsize?
  - Are there handicapped equipped apartments, if you need it at some point?
  - How are the views – do the windows face a green space or garden?
  - Were you invited to look at the different units available?
  - Is there plenty of storage space or is additional storage provided?
  - Are pets allowed, if so are there limits on size or type?
  - Are there homeowner’s association membership fees?
  - Are you allowed to have visitors at any time and overnight or is there a curfew and rules?
  - Which maintenance issues will you be responsible for and which are included in the apartment?
  - Are housekeeping services available and what is the cost?
  - Are you required to have renter’s insurance?
  - Are there homeowner rules about decorating and upkeep?
- About cooking food:
  - Do the residents like the food?
  - Are you visiting family allowed to join you for meals?
- About social life and activities:
  - Is there a beauty salon or barber shop in the community or nearby?
  - Are there religious services nearby or in the community?
  - Is there a community center and how well equipped and large is it?
  - Is there a fitness center or gym?
  - What types of additional recreation facilities are offered?
  - If you enjoy a sport, like tennis, golf, or swimming, are they offered?
  - Are there evening events like movie nights, dances, or performances by music groups?
  - Is there private dining or community room available for family or large events?
  - Is there an extensive but varied schedule of activities and classes, including ones that interest you?
  - Is there computer and media rooms available?
- About the staff:

- Does the communities work with an agency that provides in-home care companions if you need assistance in the future?
    - How much training does the staff have?
    - Are background checks done before hiring staff? If so, when and how?
    - What is the staff turnover rate?
    - Is there an activity director or staff member in charge of leading and organizing activities?
  - About Medical Care:
    - Is there a CNA, RN, or LVN on staff?
    - Is the community affiliated with a hospital or nursing home if more care is needed?
    - Does the community work with an agency that provides nursing and medical assistance if needed in the future?
    - Is there a medical unit or clinic within the community?
    - If so, what services are available from nurses, doctors, physical therapists, etc.?
4. Forms to ask for:
- A copy of the most recent survey results from state inspectors
  - A copy of the resident bill of rights
  - A recent weekly menu of snacks and meals
  - A recent list of weekly events and activities
  - Copies of the contracts, lease, etc.

Write down the answers to the questions as you go and keep a checklist for each community that you visit. If your visit was scheduled, it is a good idea to just drop in to see if the experience is just as nice. It is a bad sign if you are not allowed an unscheduled visit. Once you have narrowed the choices to a few, schedule in-depth visits and dig much deeper.