



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 _____

Notes

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

Building(s) and grounds...

Notes

- 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: _____

Evaluation: Excellent Good Acceptable Unacceptable

Services and support include...

Notes

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

Evaluation: Excellent Good Acceptable Unacceptable

The employees appear...

Notes

- courteous, friendly, eager to help?
- neat, clean, well-groomed?
- adequately trained, good at what they do?

above all, respectful of the residents?

Evaluation: Excellent Good Acceptable Unacceptable

Notes

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?

Evaluation: Excellent Good Acceptable Unacceptable

Notes