



Independent Retirement Community **Visit Checklist**

If Independent Retirement Living is right for you, use this handy checklist as you visit communities to get the answers you need and the peace-of-mind you're seeking.

Community Services

Notes/Comments

- Staff available 24 hours a day
- Meals (number per day, meal times, special dietary needs, other information)
- Security system
- Emergency call or response system
- Activities & events (frequency, types, quality)
- Scheduled transportation
- Utilities (and exclusions, if applicable)
- Housekeeping (frequency)
- Linen service
- Laundry facilities
- Parking (garage, carport, lot)
- Storage
- Barber/beauty salon
- Guest accommodations
- Fitness equipment and exercise programs
- Pet policy
- Emergency protocol for residents
- Elevator(s)
- Handicap accessible
- Religious services available
- Additional services available

Visit & Tour	Notes/Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Grounds, landscape and building exterior kept up <input type="checkbox"/> Pleasantly greeted upon entering the community <input type="checkbox"/> Activity in the building upon entering <input type="checkbox"/> Décor was attractive and home-like <input type="checkbox"/> Community in good repair, clean, free of odor and pleasant in temperature <input type="checkbox"/> Floor plan layout was easy to navigate <input type="checkbox"/> Wide hallways <input type="checkbox"/> Had a meal with residents <input type="checkbox"/> Mealtime experience was pleasant <input type="checkbox"/> Food was good <input type="checkbox"/> Ample natural and artificial lighting <input type="checkbox"/> Clean carpet and furniture <input type="checkbox"/> Staff members interacted with you when you passed by during the tour <input type="checkbox"/> Residents were using the activity room <input type="checkbox"/> Residents were using the game room/lounge <input type="checkbox"/> Residents were using the fitness equipment <input type="checkbox"/> Activity in the common areas of the community <input type="checkbox"/> Common areas foster easy and independent living <input type="checkbox"/> Retirement community has a good reputation in the local community <input type="checkbox"/> Occupancy of community (percentage of apartments occupied) <input type="checkbox"/> Guest suite available for overnight or trial stay <input type="checkbox"/> Received an invitation for an overnight or trial stay 	

Contract & Fees	Notes/Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Buy-in fee <input type="checkbox"/> Length of lease (short-term, long-term, exact length) <input type="checkbox"/> Deposit fees <input type="checkbox"/> Monthly fee <input type="checkbox"/> Billing and payment options <input type="checkbox"/> Items not included in monthly fee (hidden fees, additional services, additional meal costs, pet fees) <input type="checkbox"/> Extra charges are clear and reasonable <input type="checkbox"/> Fee changes (when, why, how often, most frequent fee increase and amount) <input type="checkbox"/> Involvement with fee changes and notification protocol <input type="checkbox"/> Contract changes permitted <input type="checkbox"/> Contract termination policy & move-out policy <input type="checkbox"/> Second occupant fee 	
Apartment	Notes/Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Single and double occupancy permitted <input type="checkbox"/> Kitchenette <input type="checkbox"/> Appliances provided, permitted (and any restrictions) <input type="checkbox"/> Emergency pull cords or emergency response system <input type="checkbox"/> Easy to access cupboards, storage and closets <input type="checkbox"/> Handrails in bathroom <input type="checkbox"/> Good natural and artificial lighting <input type="checkbox"/> Individual climate control <input type="checkbox"/> Non-skid flooring and firm carpets for walking ease 	

Staff	Notes/Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Staff was friendly, respectful and personable <input type="checkbox"/> Staff knew the residents by name <input type="checkbox"/> Staff was dressed appropriately <input type="checkbox"/> Staff interacted warmly with the residents during the tour <input type="checkbox"/> Staff members were friendly to you when you passed by during your tour <input type="checkbox"/> Management team well staffed, experienced, effective, friendly and personable <input type="checkbox"/> Number of staff members on duty each day <input type="checkbox"/> Staff was able to answer your questions clearly and sufficiently 	
Residents	Notes/Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Introduced to residents <input type="checkbox"/> Spoke with residents about their experience <input type="checkbox"/> Residents seemed to be appropriate neighbors <input type="checkbox"/> Residents socialized with each other <input type="checkbox"/> Residents appeared happy and comfortable <input type="checkbox"/> Visits with residents welcome at any time 	
Your Response	Notes/Comments
<ul style="list-style-type: none"> <input type="checkbox"/> Your feeling when you toured the community <input type="checkbox"/> Other observations you noticed that are important to note <input type="checkbox"/> Your thoughts and feelings about your visit <input type="checkbox"/> Any additional information you would like to have that you didn't receive during your visit 	

