

Independent Living Community – Administrative Checklist

Take this handy guide with you when you speak to the community relations or management staff. Asking the right questions upfront will help you make a more informed decision about the right independent living community for you.

Community Information

Community Name:	Contact/Title:
E-Mail:	Phone:

Social, Cultural & Wellness Activities	Yes	No	Notes
Is there a monthly activities calendar published and posted?	<input type="checkbox"/>	<input type="checkbox"/>	
Are the activities posted online?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the community have a volunteer program?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the community have a good reputation in the surrounding community?	<input type="checkbox"/>	<input type="checkbox"/>	
Do the fitness offerings accommodate varying abilities?	<input type="checkbox"/>	<input type="checkbox"/>	
What are the fitness and exercise offerings? List:			
What social activities are offered and how often? List:			
Do the activities offered cater to your interests?	<input type="checkbox"/>	<input type="checkbox"/>	

Personal Services	Yes	No	Notes
May the resident hire outside home care and/or home health providers to provide services within the independent living community?	<input type="checkbox"/>	<input type="checkbox"/>	
What onsite services are available?			
• Hair salon/beautician	<input type="checkbox"/>	<input type="checkbox"/>	
• Foot care	<input type="checkbox"/>	<input type="checkbox"/>	
• Computer support	<input type="checkbox"/>	<input type="checkbox"/>	
• House cleaning	<input type="checkbox"/>	<input type="checkbox"/>	
• Laundry service	<input type="checkbox"/>	<input type="checkbox"/>	
• Travel agent	<input type="checkbox"/>	<input type="checkbox"/>	
• Massage therapy	<input type="checkbox"/>	<input type="checkbox"/>	
• Other services - List:			

Transportation	Yes	No	Notes
Is transportation available for specific appointments?	<input type="checkbox"/>	<input type="checkbox"/>	
If yes, what is the schedule?			
Are there any limitations?			
Is there guest parking?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there dedicated resident parking spots?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there an additional cost to use the community van or car?	<input type="checkbox"/>	<input type="checkbox"/>	

Pets	Yes	No	Notes
Are pets allowed?	<input type="checkbox"/>	<input type="checkbox"/>	
If so, what types?			
What is the pet deposit amount, if any?			
Are there provisions if the resident goes on vacation or has to be hospitalized?	<input type="checkbox"/>	<input type="checkbox"/>	

Meals	Yes	No	Notes
Are special diets accommodated? (low-sodium, low-sugar, ethnic)	<input type="checkbox"/>	<input type="checkbox"/>	
Are meals available anytime or are they only offered on a set schedule?	<input type="checkbox"/>	<input type="checkbox"/>	
Do residents have input into meal planning?	<input type="checkbox"/>	<input type="checkbox"/>	
Do residents have a choice of foods for each meal?	<input type="checkbox"/>	<input type="checkbox"/>	
Are healthy snacks available at all times?	<input type="checkbox"/>	<input type="checkbox"/>	
May residents have their meal in their apartment?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there special holiday meals where families can attend?	<input type="checkbox"/>	<input type="checkbox"/>	
Are the vegetables and meats purchased organically grown?	<input type="checkbox"/>	<input type="checkbox"/>	
What is the policy and cost for family members to eat with residents?			
What meal plans are available? List:			

Security & Safety	Yes	No	Notes
Does staff undergo a background check? Which staff?	<input type="checkbox"/>	<input type="checkbox"/>	
What type? (driver's license, criminal, national or state)			
What policies are in place to protect the personal property of each resident?			

Healthcare & Medication	Yes	No	Notes
Is there an on-call physician, nurse practitioner or physician's assistant?	<input type="checkbox"/>	<input type="checkbox"/>	
What is the policy for responding to a resident's medical emergency?			

Policies & Cost	Notes
What are the contract options available?	
What are the entrance fees?	
What are the policies for refunding entrance or waiting list deposit fees?	
What is the pet deposit?	
What services are included in the monthly rate? List:	
What additional fees are charged for care, services and supplies?	
What are the billing, payment and credit policies?	
What is the policy for fee increases?	
Under what conditions can a contract be terminated?	
What are the policies for determining a resident's need to move to another care level?	