

Community Assessment

Please feel free to photocopy these pages and use them as you contact various senior communities. We hope you find this useful as you gather information.

Name of community _____

Address _____

Telephone number _____

Name of contact person _____

E-mail address _____

Appointment scheduled for (date and time) _____

Directions to community _____

Names of friends and family who are considering—or who already are—living in this community _____

Community Assessment

Name of community _____ Date of visit/call _____

| Feature | yes/no | notes |
|---------|--------|-------|
|---------|--------|-------|

Physical location

| | | |
|--------------------------------|--|--|
| Neighborhood pleasant and safe | | |
| Shopping | | |
| Doctors | | |
| Dentists | | |
| Hospital | | |
| Banks | | |
| Beauty/barber salon | | |
| Place of worship | | |
| Cultural events | | |
| Near family/friends | | |

Services offered

| | | |
|--------------------------|--|--|
| Independent Living | | |
| Assisted Living | | |
| Memory Care | | |
| Respite Care | | |
| Skilled Nursing & Rehab. | | |
| Home Health | | |
| Home Care | | |

Community Assessment

Name of community _____ Date of visit/call _____

| Feature | yes/no | notes |
|---------|--------|-------|
|---------|--------|-------|

Physical appearance and amenities

| | | |
|-----------------------------|--|--|
| Main building | | |
| Age of building | | |
| Clean/maintained | | |
| Grounds | | |
| Comfortable lobby | | |
| Other public areas | | |
| Apartments | | |
| High ceilings | | |
| Lighted hallways | | |
| Library | | |
| Exercise/fitness facilities | | |
| Housekeeping | | |
| Linen service | | |
| Laundry facilities | | |
| Beauty/barber salon | | |
| Multipurpose room | | |
| Craft room | | |
| Private party room | | |

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|-----------------------------|--------|-------|
| Banking services | | |
| Chapel | | |
| Billiard/game room | | |
| Country store (and hours) | | |
| Walking paths/gardens | | |
| Cable TV | | |
| Guest room(s) | | |
| Covered/underground parking | | |
| Surface parking | | |
| Pool | | |

Restaurant or meal service

| | | |
|----------------------------|--|--|
| Meals available | | |
| Meals prepared on site | | |
| Meal plans | | |
| Menu choices | | |
| Room service to apartments | | |
| Choice of dining rooms | | |
| Private dining room | | |
| Served by wait staff | | |
| Escorts to meals | | |

Community Assessment

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| Feature | yes/no | notes |
|--|--------|-------|
| Health and personal care services | | |
| Medicare certified | | |
| Staff to resident ratio | | |
| Number of hours staffed | | |
| RN (number of hours) | | |
| Licensed social worker | | |
| EMT or licensed nurse | | |
| Medication assistance | | |
| Escorts to activities | | |
| Therapists available | | |
| Medical direction | | |
| On-site doctor | | |
| Individual care plans | | |
| Emergency pendant or pull cord | | |
| 24-hour on-site staff | | |
| Front desk monitor | | |
| 9-1-1 available | | |
| Security | | |

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|---------|--------|-------|
|---------|--------|-------|

Activities and transportation

| | | |
|----------------------------|--|--|
| Personalized plan | | |
| Social | | |
| Entertainment | | |
| Lifelong learning | | |
| Exercise/fitness classes | | |
| Outings | | |
| Spiritual | | |
| Volunteer opportunities | | |
| Near bus line | | |
| Bus/van operated by center | | |
| Scheduled transportation | | |
| By appointment | | |
| Scheduled group outings | | |

Costs

| | | |
|----------------|--|--|
| Monthly rental | | |
| Deposit | | |
| Lease terms | | |
| Entry fee | | |
| Move-out terms | | |
| Good value | | |

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|---------|--------|-------|
|---------|--------|-------|

Management and staff

| | | |
|-------------------------------|--|--|
| Length of time in business | | |
| Maintains accurate records | | |
| Owner is involved in business | | |
| Resident council | | |
| Smoking policy | | |
| Firearms policy | | |
| Pet policy | | |
| License/certification | | |
| Compliance history | | |
| Staff know residents' names | | |
| Happy/smiling | | |
| Service oriented | | |
| Enthusiastic | | |
| Well groomed | | |