



Michael P. Bertrand, Founder

Independent Living Community Evaluation Tool

Helping You Make the Right Choice with Confidence

Save Time. Reduce Stress. Simplify Decisions.

Choosing the right senior housing or care option for your loved one can be overwhelming. This evaluation tool is designed to:

- Save you time by streamlining your evaluation process.
- Reduce your stress by giving you clarity and confidence.
- Simplify a complex decision into actionable steps.

We understand the challenges family caregivers face and we're here to help you navigate this journey.

Take the Next Step Today

This evaluation tool is designed to help guide you to the best solution for your loved one. If you feel as if you need additional guidance, **book a free 30-minute consultation call here.**

You're not alone - we're here to help.



NewDirections

INDEPENDENT LIVING COMMUNITY EVALUATION TOOL

Name of Community:

Street Address:

City/State/Zip Code:

Telephone (Landline):

Telephone (Mobile):

Email Address:

Date of Visit:

Representative(s):

Neighborhood/Area Characteristics

- ☐ The community is located near family and friends
- ☐ The community is situated in a safe neighborhood
- ☐ Shopping and entertainment centers are easily accessible
- ☐ Recreational amenities are conveniently available
- ☐ Hospitals and clinics are in close proximity

Community Reception and Atmosphere

- ☐ All visitors receive a prompt and warm welcome
- ☐ The staff members are friendly and courteous
- ☐ Staff members address current residents by name and show familiarity
- ☐ Current residents are friendly and welcoming
- ☐ You feel safe, at ease, and comfortable in the community
- ☐ The staff gives careful attention to all your questions

Quality of Life & Wellness Programs

- ☐ A calendar of planned social activities, events, and outings is available
- ☐ A list of resident clubs, groups, and committees is provided
- ☐ Exercise classes, wellness programs, and/or on-site fitness facilities are offered
- ☐ Classes, lectures, and other learning opportunities are regularly available
- ☐ Community has scheduled, regular outings to places of interest, with transportation included
- ☐ Volunteer opportunities are available both inside and outside the community
- ☐ Spiritual support and religious services are offered
- ☐ Entertainment and cultural events are provided
- ☐ There are numerous activities and opportunities that interest you
- ☐ Outdoor walking, gardening and recreation spaces are available



Quality of Life & Wellness Programs (Continued)

- ☐ There are additional levels of care available in this community:
 - ☐ Assisted Living
 - ☐ Memory Care
 - ☐ Skilled Nursing

Dining/Food Service

- ☐ Regular meals in a communal dining room are provided
- ☐ The dining areas are appealing and have a pleasant aroma
- ☐ Tables, chairs and linens are clean and well-maintained
- ☐ Residents are allowed to invite guests for meals
- ☐ Residents collaborate with dining staff on menu planning
- ☐ The community offers options for special dietary needs
- ☐ A dietitian or nutritionist is involved in creating the meal plans
- ☐ There are a variety of dining venues to choose from
- ☐ You have the opportunity to sample more than one meal

Amenities & Services

- ☐ Amenities and services align with your interests, preferences, and lifestyle
- ☐ Routine cleaning and maintenance of the resident living space is provided
- ☐ Laundry and linen services are provided
- ☐ Utilities are included in the monthly rent:
 - ☐ Water/sewage
 - ☐ Electricity
 - ☐ Cable/internet
 - ☐ Telephone
- ☐ Trash removal is provided
- ☐ Transportation services, including arranging private transportation, are available
- ☐ Concierge services including assistance with tasks such as scheduling appointments or handling deliveries are available
- ☐ Security is on hand around the clock
- ☐ Counseling and/or psychology services are available
- ☐ Nurse's station or wellness clinic is available
- ☐ Library/reading room
- ☐ Lounges and communal living areas
- ☐ Beauty salon/barber shop
- ☐ Swimming pool/hot tub
- ☐ Gardens and walking paths
- ☐ Technology and connectivity services are available



Pricing Structure

- ☐ Monthly rent covers:
 - ☐ Housing
 - ☐ Basic Utilities
 - ☐ Meal Plan plus snacks
 - ☐ Housekeeping
 - ☐ Laundry
 - ☐ Scheduled Transportation
 - ☐ Social Activities
- ☐ Extra fees are charged for additional services over and above those in the basic monthly rent
- ☐ Community charges additional fees for extra meals or guest meals
- ☐ The community offers additional care services (like personal assistance or medication management) for an additional fee
- ☐ Information on other additional fees such as for special events, guest accommodations or use of certain amenities is provided
- ☐ The community requires a security deposit or community fee and specifies the terms for this deposit, including any conditions for its return
- ☐ Information on the length of the contract or lease agreement is provided as well as any penalties for early termination
- ☐ Renter's insurance is required
- ☐ All costs are clearly explained and the community is transparent about any potential future increases or changes in fees or rent
- ☐ If there is an entrance fee, you understand the refundability options
- ☐ Pricing sheets for floor plans, contract types and care services are available

Building, Grounds & Maintenance

- ☐ Community is clean and well-maintained
- ☐ Grounds are landscaped and well kept
- ☐ Ample parking is provided for residents and visitors
- ☐ Interior of the building is well lit and exits are well marked
- ☐ Parking area is convenient and well lit
- ☐ Safety features are in place such as handrails and grab bars
- ☐ The community has security cameras and secure entrances
- ☐ Available residences, as well as their sizes and layouts, suit your preferences
- ☐ Residences have safety features, including an emergency alert system and fire suppression system
- ☐ Resident units have individually controlled thermostats
- ☐ Residents are free to decorate their apartments according to their personal taste
- ☐ Community is pet-friendly
- ☐ Additional storage is available
- ☐ The community has an emergency generator or alternate power source



Staffing

- ☐ Staff members undergo screenings and background checks prior to employment
- ☐ Staff undergo ongoing training and professional development
- ☐ Staff members are available 24/7
- ☐ The community utilizes temporary employment agencies
- ☐ The community utilizes vetted and trained volunteers
- ☐ A formal plan is in place to resolve conflicts between residents and staff
- ☐ A plan is in place for medical emergencies, natural disasters and other crises

Ownership and Financial Items

- ☐ The name of the owner/operator of the community is provided and the length of time they've been in business
- ☐ Information on planned changes in ownership or management is provided
- ☐ Information on plans for expansion or renovation is provided and how it will be financed
- ☐ Occupancy reports are available
- ☐ Explanation of how annual rate increases are implemented is provided
- ☐ Community invests in capital improvements
- ☐ Residents are involved in or informed about major decisions



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