

COMMUNITY TOUR CHECKLIST

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Use this checklist during every community visit. Circle or check each item as you go.

Community Name: _____ Date of Visit: _____

Your Name: _____ Rating (1-10): _____

How to use this checklist: Print one copy per community you visit. Complete it during or immediately after each tour. Compare your completed checklists side-by-side when making your final decision. The questions in **Section 8** are the most important.

01 FIRST IMPRESSIONS

☐ **The exterior and grounds are well-maintained**

Landscaping, parking, entryway condition

☐ **Current residents appear engaged and content**

Look for eye contact, activity, smiling

☐ **The lobby feels welcoming, not clinical or institutional**

Smell, lighting, decor, noise level

☐ **The community feels lived-in, not staged for your visit**

Personal items, residents moving freely

☐ **Staff acknowledged you promptly and warmly**

Did anyone greet you within 60 seconds?

☐ **You feel comfortable imagining your loved one here**

Trust your gut on this one

Notes: _____

02 STAFFING AND CARE

☐

Staff-to-resident ratios were clearly explained

Ask for day, evening, and overnight ratios separately

☐

Staff addressed residents by name during your visit

A strong indicator of relationship quality

☐

Staff turnover rate was shared openly

Industry average is high; low turnover is a green flag

☐

You were told how care needs are reassessed as they change

What triggers a level-of-care review?

☐

Care plans are individualized and reviewed regularly

Ask how often and who is involved

☐

Move-out policy for declining health was explained

What happens if needs exceed what they can provide?

☐

A licensed nurse is on-site 24/7 (or clearly available)

Confirm for nights and weekends specifically

Notes:

PRO TIP: STAFFING

Ask to see the actual staffing schedule for a random recent week, not just the policy. Real ratios often differ from stated ratios, especially overnight.

03 LIVING SPACES

- | | |
|---|---|
| ☐ You toured the actual available unit, not just a model
<i>Model units can be misleading about size and light</i> | ☐ The unit can be personalized with their own furniture
<i>Confirm what is and is not permitted</i> |
| ☐ The unit has adequate natural light and ventilation
<i>Open the blinds; check window size and direction</i> | ☐ Noise levels from hallways and neighbors are acceptable
<i>Visit during an active time of day</i> |
| ☐ Storage space is sufficient for personal belongings
<i>Closets, shelving, and furniture fit</i> | ☐ Bathrooms are designed for safety and accessibility
<i>Grab bars, roll-in shower, threshold height</i> |
| ☐ Emergency call systems are present and easy to reach
<i>Bathroom, bedroom, and common areas</i> | |

Notes: _____

PRO TIP: MOVE-IN TIMING

If possible, visit the specific unit that is available, at the time of day your loved one is most active. Morning people and afternoon people experience communities very differently.

04 DINING

- ☐ **You sampled a meal or reviewed the weekly menu** ☐ **Residents eat in a social dining room, not isolated**
Never trust a community you haven't eaten at *Isolation at mealtime is a quality-of-life flag*

- ☐ **Dining hours are flexible enough for varied schedules** ☐ **The kitchen and dining areas are visibly clean**
What are the earliest and latest meal times? *Check trays, serving areas, and staff hygiene*

- ☐ **Dietary restrictions and preferences are accommodated** ☐ **Substitutions are available if the daily menu isn't appealing**
Ask about low-sodium, vegetarian, cultural needs *No one should go hungry because they dislike the entree*

Notes: _____

05 ACTIVITIES AND COMMUNITY LIFE

- ☐ **A full activity calendar was provided for review** ☐ **Religious or spiritual needs can be accommodated**
Ask for last month's actual calendar, not a sample *Services, clergy visits, quiet space*

- ☐ **Activities match your loved one's interests and abilities** ☐ **Residents have input into programming and activities**
Look for variety: physical, social, creative, spiritual *A resident council is a good sign*

- ☐ **Outings and transportation are available and frequent** ☐ **There is meaningful engagement for memory care residents**
How many off-site trips per month? *Structured sensory and cognitive programming*

Notes: _____

06 SAFETY AND SECURITY

- ☐ **Entry and exit points are secure without feeling restricted**
Especially important for memory care
- ☐ **Medication management procedures were explained**
Who administers? How are errors documented?

- ☐ **The community has a clear emergency response plan**
Ask what happens during a fire, weather event, or fall
- ☐ **The community's recent inspection reports are available**
State survey results are public; ask to see them

- ☐ **Fall prevention measures are visible and active**
Non-slip flooring, good lighting, handrails throughout
- ☐ **Security cameras and monitoring are in common areas**
Balance safety with resident privacy expectations

Notes: _____

PRO TIP: INSPECTIONS

Every state posts senior living inspection reports publicly. Search '[state] assisted living inspection database' before your tour and arrive already informed.

07 CONTRACTS AND COSTS

- ☐ **You received a full written contract to review before signing.**
Never sign on the same day as a tour
- ☐ **The move-out policy and refund terms are clear in writing.**
What notice is required? Is the deposit refundable?

- ☐ **All fees were itemized including move-in and ancillary costs.**
Ask specifically about medication management fees
- ☐ **Medicaid or VA benefit acceptance was confirmed in writing.**
Do not rely on verbal assurances

- ☐ **Rate increase history for the past three years was shared.**
How often? By how much? What triggers increases?
- ☐ **You understand what triggers a level-of-care charge increase.**
Get specific examples in writing

Notes: _____

PRO TIP: CONTRACTS

Have an elder law attorney review any contract before signing. A one-hour consultation can prevent costly misunderstandings about rate increases, move-out terms, and arbitration clauses.

08 YOUR GUT CHECK

☐ You spoke with at least one current resident privately ☐ Nothing felt rushed or high-pressure during the visit
Their candid feedback is more valuable than any tour *A good community lets you take your time*

☐ You spoke with at least one family member of a resident ☐ You would feel comfortable leaving a parent here alone
Ask how responsiveness compares to what was promised *The most honest question on this list*

☐ You visited a second time unannounced (or plan to)
Communities show their best self on scheduled tours

Notes: _____

FINAL ASSESSMENT

OVERALL RATING	WOULD YOU RETURN?	NEXT STEP
___ / 10	Yes No Maybe	Request contract Schedule 2nd visit Pass

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