

Senior Living Community Tour Checklist

Use one copy for each community you visit. Jot down details during the tour, then compare your notes afterward while the visit is still fresh.

COMMUNITY SNAPSHOT

COMMUNITY NAME

APARTMENT / ROOM CONSIDERED

DATE TOURED

STARTING MONTHLY RATE

CONTACT PERSON

ENTRANCE / COMMUNITY FEE

COMMUNITY TYPE

Before the tour: what matters most?

Write down the three things that matter most to your loved one and your family.

- 1
- 2
- 3

Quick impression

Circle 1-5 after the tour · 1 = Poor · 5 = Excellent

- Care & support

12345
- Environment

12345
- Activities

12345
- Value

12345

- Staff interaction

12345
- Dining

12345
- Location

12345
- Overall fit

12345

Questions to ask during the tour

01 Care & support

- ☐ What levels of care do you provide?
- ☐ How often are care needs reassessed?
- ☐ If needs increase, is there a point when a resident would need to move?
- ☐ Is medication management available?
- ☐ How are changes in a resident's condition communicated to family?
- ☐ How do you determine how much assistance a resident needs?
- ☐ What happens if a resident begins to need more help?
- ☐ Which services are included in the base rate, and which cost extra?
- ☐ Is help available overnight?

NOTES

02 Staffing

- ☐ Who is on-site during the day, evening, and overnight?
- ☐ How are staffing levels determined?
- ☐ How are new employees trained?
- ☐ How does the community handle an unexpected change in a resident's health or behavior?
- ☐ What types of caregivers or clinical staff are available?
- ☐ How long have key staff members been here, and what is staff turnover like?
- ☐ Who should a family contact with a concern?

NOTES

03 Daily life & dining

- ☐ What does a typical day look like for residents?
- ☐ How do you help a new resident adjust during the first few weeks?
- ☐ How flexible are meal times and dining options?
- ☐ Can family members join residents for meals?
- ☐ How are activities planned for different interests and ability levels?
- ☐ What transportation is available?
- ☐ Can dietary needs and preferences be accommodated?

NOTES

Questions to ask during the tour

04 The apartment & community

- | | |
|--|--|
| ☐ What apartment sizes and layouts are available? | ☐ What furnishings or appliances are included? |
| ☐ Can residents bring their own furniture and decorate their space? | ☐ Is housekeeping included? |
| ☐ Is laundry included or available? | ☐ Are pets allowed? |
| ☐ What outdoor spaces are available? | ☐ Are there comfortable places to spend time outside the apartment? |
| ☐ What security and emergency-response systems are in place? | |

NOTES

05 Costs & contracts

- | | |
|---|---|
| ☐ What is the base monthly rate? | ☐ What exactly is included in that rate? |
| ☐ Which services have additional fees? | ☐ How are care charges determined? |
| ☐ How often can rates or care fees increase? | ☐ Can you give me an example of what a resident with additional care needs might pay each month? |
| ☐ What deposits are required? | ☐ Is there a community or entrance fee? |
| ☐ What is the refund or cancellation policy? | ☐ Can I see a sample residency agreement and complete fee schedule? |

NOTES

06 If you are considering memory care

- | | |
|---|--|
| ☐ What dementia-specific training does staff receive? | ☐ How is the memory care environment secured? |
| ☐ How do you respond to wandering or exit-seeking behavior? | ☐ How are activities adapted for different cognitive abilities? |
| ☐ How do you approach changes in behavior or distress? | ☐ How are families involved in care planning? |
| ☐ As dementia progresses, what changes in care can you accommodate, and what might require a resident to move? | ☐ Are residents able to spend time outdoors safely? |

NOTES

After the tour

07 What to notice while you are there

- ☐ Do residents appear comfortable and engaged?
- ☐ Do staff seem to know residents by name?
- ☐ Are residents using the common spaces?
- ☐ Does the dining room feel inviting?
- ☐ How do staff members speak to and interact with residents?
- ☐ Does the community feel calm, welcoming, and well cared for?
- ☐ Do you notice odors that concern you?
- ☐ Can you picture your loved one living here?

My notes after the visit

WHAT STOOD OUT IN A GOOD WAY?

WHAT CONCERNS OR QUESTIONS REMAIN?

WHAT DID MY LOVED ONE LIKE OR DISLIKE?

ESTIMATED MONTHLY COST BASED ON OUR NEEDS:

Follow-up questions

- 1
- 2
- 3

FINAL GUT CHECK

Would this community feel like home?

The most impressive community is not automatically the right one. Look for the setting that best fits your loved one's needs, preferences, personality, and priorities.