

The Complete Checklist for Choosing a Senior-Living Community

A 10-page guide for families & seniors

[\[Directiny\] • www.directiny.com](http://www.directiny.com)

Free download – in exchange for a quick testimonial with coupon code



Why a Checklist Matters

- 1- **Decision fatigue:** Families sift through dozens of options; a checklist keeps focus.
 - 2- **Safety first:** Guarantees that health-care, emergency, and security standards are met.
 - 3- **Budget control:** Helps compare true-up costs vs. hidden fees.
 - 4- **Peace of mind:** A systematic review reduces regret later.
- > **Quick tip:** Print this guide and bring it to every tour.



Step 1 – Identify Your Priorities (Self-Assessment)

Create a “must-have” vs. “nice-to-have” list.

1. Start With a Brain Dump

Grab a notebook or open a new Google Doc. Write ****everything**** that matters to you or your loved one—no editing yet. Typical categories include:

- ****Location**** – proximity to family, climate preferences, urban vs. rural, nearby hospitals, public transport.
- ****Care Level**** – independent living, assisted living, memory-care, skilled nursing, hospice.
- ****Lifestyle & Amenities**** – pet-friendly, on-site fitness classes, arts & crafts, library, garden, dining style, religious services.
- ****Budget**** – maximum monthly spend, what’s included (meals, housekeeping, utilities, medication management), tolerance for “extra fees.”
- ****Health & Safety**** – on-site nursing staff, emergency call system, medication administration, fall-prevention measures, infection-control protocols.
- ****Social & Emotional Needs**** – community size, resident demographics, visitation policy, volunteer programs, social events calendar.

2. Sort Into “Must-Have” vs. “Nice-to-Have”

Create two columns:

Must-Have (non-negotiable)	Nice-to-Have (bonus)
-----	-----
Example: 24-hour nurse on-site	Example: Rooftop garden
Example: Pet-friendly (any breed)	Example: On-site salon
Example: Monthly cost ≤ \$3,000	Example: Weekly cultural outings

Only items in the left column should block a decision; the right column can be used to differentiate between equally-qualified communities.

3. Rank Each Category by Importance (1-5)

Assign a weight to every major category. Higher numbers mean the factor is more critical to overall satisfaction.

Category	Weight (1-5)
-----	-----
Location	4
Care Level	5
Lifestyle	3
Budget	5
Health & Safety	5
Social Needs	2

4. Build Your Personal Checklist

Combine the three steps above into a single printable sheet you can bring to every tour.

☐ My Must-Have List

- _____
- _____
- _____

☐ My Nice-to-Have List

- _____
- _____

☐ Category Weights

Location (____) Care Level (____) Lifestyle (____)
Budget (____) Health & Safety (____) Social Needs (____)

5. Quick Self-Reflection Questions

Answer these before you start visiting communities. Write the answers next to each question.

1. ****Who will be living here?**** (Age, mobility, cognitive status)
2. ****How often will family visit?**** (Daily, weekly, monthly)
3. ****What health services are required now vs. in the future?****
4. ****What budget cushion can you maintain for unexpected costs?****
5. ****What activities keep the resident happiest today?****

6. Takeaway

A clear, weighted priority list turns a vague “I want a good place” into a concrete decision framework. Use this sheet as the ****first filter****: any community that fails a single “must-have” automatically drops off, saving time and emotional energy.

Print this page, fill it out, and bring it with you on every tour.

Step 2 – Shortlist Communities (Research)

1 ****Google Maps “Nearby Senior Housing”**** – type “senior living near [city]” and toggle the “Nearby” layer to see exact locations on the map.

2 ****State licensing search**** – most states publish a searchable PDF or web portal of licensed facilities (e.g., <https://www.usa.gov/state-health-departments>).

3 ****Local HOA or church newsletters**** – many senior-friendly communities advertise in community bulletins; a quick Google search of “[city] senior living newsletter” often uncovers hidden gems.

MINI-SHORTLIST TABLE (fill-in as you research)

Community	Address	Phone	First impression (1-sentence)

 ****Tip:**** Record the source (website, phone call, referral) next to each entry so you can verify later.

Step 3 – Pre-Visit Prep

- **Schedule tours** (in-person or virtual).
- **Ask for a brochure** and a copy of the **Resident Agreement**.
- **Prepare a list of 10-15 questions** (see next page).
- **Bring a notebook** (or print this checklist).

TOUR PACK – WHAT TO BRING

- Photo-ID of the resident & your own ID
- Current medication list (names, dosages)
- Recent health-care notes (physician's summary)
- Notebook or a printed copy of this checklist
- Smartphone (to take photos of rooms, common areas)
- List of 10-15 questions (see page 6)

SAMPLE PRE-TOUR EMAIL (copy-paste)

Subject: Request for Tour – [Your Name] / [Resident's Name]

Hi [Community Contact],

My name is [Your Name] and I'm exploring senior-living options for my [relationship, e.g., mother, father]. I'm interested in scheduling a tour of [Community Name] on [preferred dates/times]. Could you let me know availability and whether a virtual walk-through is possible?

Thank you,
[Your Name]
[Phone] | [Email]

SAMPLE FOLLOW-UP EMAIL (after the tour)

Subject: Thank you – Quick Follow-up Questions

Hi [Contact Name],

Thank you for the tour yesterday. I have a few follow-up questions (see attached list). I appreciate your help and will let you know my decision within the next week.

Best,
[Your Name]

15 Must-Ask Questions (During the Tour)

| **Area** | Sample Question |

| **Safety** | “What emergency-call system is in place? How fast is response time?” |

| **Staffing** | “What is the staff-to-resident ratio day/night? Are caregivers certified?” |

| **Medical care** | “Do you have an on-site RN or physician? How are medication errors prevented?” |

| **Meals** | “Can you accommodate dietary restrictions? How are meals prepared?” |

| **Activities** | “What social, physical, and cognitive programs are offered?” |

| **Cost** | “What exactly is included in the monthly fee? Are there any hidden fees?” |

| **Resident rights** | “How do you handle complaints? What is the discharge policy?” |

| **Pet policy** | “Are pets allowed? Any breed/size restrictions?” |

| **Transportation** | “Do you provide shuttle services to medical appointments or shopping?” |

| **Housekeeping** | “How often are rooms cleaned? Are linens changed weekly?” |

| **Family involvement** | “Are family members welcome to visit any time? Are there private meeting rooms?” |

| **Renovations** | “Any planned construction that could affect residents?” |

| **Licensing** | “Can you show the current state license and any recent inspection reports?” |

| **Resident turnover** | “What’s the average length of stay? Why do residents leave?” |

| **Trial period** | “Do you offer a short-term stay or a money-back guarantee?” |

Mark each answer with ✓ / ✗ and a short note.

Step 4 – Compare & Score (Scoring Matrix)

– Compare & Score (Scoring Matrix)

Create a **simple table** (rows = communities, columns = categories).

Assign a **0-5 score** for each category (5 = perfect fit).

Total score = sum of all categories.

Example:

Community	Location (5)	Care Level (5)	Safety (5)	Cost (5)	Activities (5)	Total
Sunny Meadows	4	5	5	3	4	21
River View	5	4	4	4	3	20

Higher total = better overall fit.

1 Why Score?

A numeric score turns a subjective “I like it” feeling into an objective comparison. When you line up several communities side-by-side, the highest-scoring option is the one that best matches **your** weighted priorities.

2 How to Apply Weights

- | Step | Action |
|------|---|
| a. | Write the weight (1-5) you assigned to each category in the “Identify Your Priorities” worksheet (Page 3). |
| b. | For every community, give each category a rating from 0 – 5 (0 = doesn’t meet the need, 5 = exceeds it). |
| c. | Multiply the rating by the weight. The product is the Weighted Score for that category. |
| d. | Add all weighted scores → Total Score . The higher the total, the better the overall fit. |

Example: If “Health & Safety” has a weight of 5 and you rate a community a 4, the weighted score for that column is $5 \times 4 = 20$.

3 Scoring Cheat-Sheet (0-5)

Rating	What it looks like
----- -----	
5	Exceeds expectation – e.g., 24/7 RN on-site, award-winning dining, no extra fees.
4	Meets expectation – everything you asked for, minor cosmetic shortfall.
3	Acceptable – meets most basics but a few “nice-to-have” items missing.
2	Below expectation – key requirement missing or limited service.
1	Poor – major red flag (e.g., no emergency call system).
0	Not applicable / no information available.

4 Sample Blank Weighted Scoring Matrix (Fill-In See Example On Pg.7)

| Community | ****Weight**** | ****Location**** | ****Care Level**** | ****Lifestyle**** | ****Budget**** | ****Health & Safety**** | ****Social Needs**** | ****Total****

(Community Names 🏡 *Ex:River View*) (Scores 0-5 🍌)

•								
•								
•								
•								
•								
•								

How to use:

1. In the ****Weight**** row, copy the numbers you gave each category on Page 3 (e.g., Location = 4, Care Level = 5, ...).
2. Fill the ****Rating**** cells (0-5).
3. Multiply each rating by its weight → write the product in the same cell (or use a spreadsheet formula).
4. Sum the row to get the ****Total****.

5 Interpretation Guide

Total Score Range	What to Do
----- -----	
≥ 80 % of max possible (e.g., 80-100 % of the sum of all weights × 5)	**Strong contender** – schedule a second tour, negotiate any remaining concerns.
60 % – 79 %	**Good fit** – keep on shortlist, compare against other high-scorers.
< 60 %	**Consider dropping** – major gaps that may cause future dissatisfaction.

*Tip: If two communities land in the same range, use the ****cheapest**** or the one with the ****best resident feedback**** as the tie-breaker.

6 Blank Worksheet (copy this onto paper or a spreadsheet)

Community	Weight	Location	Care Level	Lifestyle	Budget	Health & Safety	Social Needs	Total

Instructions:

- Write the ****weight**** for each column at the top (use the numbers from Page 3).
- For each community, fill in the ****rating**** (0-5).
- Multiply **rating × weight** → write the product in the same cell (or let a spreadsheet do the math).
- Sum the row → this is your ****Total****.

Step 5 – Verify Contracts & Legal Docs

- ****Resident Agreement**** – read every clause; watch for “price escalation” language.
- ****State inspection reports**** – request the latest copy.
- ****Financial disclosures**** – ask for a detailed fee schedule.
- ****Power of attorney**** – ensure the contract allows a designated family member to act.

****Tip:**** Bring a trusted attorney or elder-law specialist for a quick review.

Decision Checklist (Final Quick-Reference)

- ☒ All ****must-have**** items checked?
- ☒ Score ****≥ 4**** in safety, staff, and medical care?
- ☒ Total monthly cost within budget ***and*** transparent?
- ☒ Residents seem ****happy**** and ****engaged**** during tour?
- ☒ Contract terms ****clear****, no surprise fees?

If ****any**** box is **✗**, keep looking or negotiate before signing.

Next Steps & Bonus Resources

1. ****Schedule a second visit**** (bring a family member).
2. ****Ask for a trial stay**** (week-long or month-to-month).
3. ****Submit your testimonial**** to our directory – you’ll get the free ebook instantly!
4. ****Download our free 1-month basic listing**** (use coupon ****KUPH4BHW****).

****Bonus links****:

- ****State licensing portal (general U.S. directory of state health-agency licensing sites):****
<https://www.usa.gov/state-health-departments>

Medicare long-term-care overview – what Medicare does / doesn’t cover:

<https://www.medicare.gov/coverage/long-term-care>

Medicare “Your Guide to Choosing a Nursing Home” (PDF) – a concise checklist you can link or embed:

<https://www.medicare.gov/care-compare/en/assets/resources/nursing-home/02174-nursing-home-other-long-term-services.pdf>

- ****National Elder Law Care (NELA) / National Council on Elder Abuse attorney directory:****

<https://www.nela.org/find-an-attorney>