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THE ULTIMATE RETIREMENT TOUR CHECKLIST



Compliments of

Sienna
SENIOR LIVING

The Ultimate Retirement Tour Checklist

When you tour a retirement community—especially for the first time—there are so many things to see that it's easy to get distracted. You may forget to ask some of the important questions you had in mind when you first set out.

There are several areas you should cover including: location, impressions of the building, staff, services and amenities, health and medical, suites, financial, food, educational classes and volunteering opportunities.

You will also want to jot down the retirement community's name, address and phone number, your tour guide's name, and any other impressions you had on your visit.

Your goal is to tour several residences at your leisure—some more than once—so that you can be sure you have found the right one.

Take this checklist with you and fill it out on your tour. That way you will have an organized set of notes about each community you visit.

Enjoy the tour!

P.S. If you still have questions about retirement residence living, you can ask them on the community page of the Comfort Life website at <http://www.comfortlife.ca/retirement-community-questions.php>

Residence Name

Residence Address:

Residence Contact Name:

Phone Number/Email:

Location

- Is the residence easy to get to?
- Is the building in a safe area?
- Is the building close to my former neighbourhood?
- Is the location close enough for my family and friends to visit?
- Are there stores, banks, cafes, entertainment, parks and doctors nearby?

Impressions of the building

- Is the building attractive, up-to-date, nicely landscaped and homelike?
- Is there enough parking for residents and guests and is there a charge?
- Is there a convenient, covered, spacious unloading area for pick-up/drop offs?
- Is there accessible public transportation nearby?
- Is the residence accredited / licensed by the retirement community association or governing body in your province? Does it display a current license or member certificate?
- Is there a receptionist or concierge, what are the hours and is there a sign in/sign out procedure?
- Is the noise level appropriate and is it as busy or quiet as I would like?
- Is the lobby populated with residents in wheelchairs, sleeping etc.?
- Does the air smell fresh and clean and is the temperature comfortable?
- Is there lots of natural lighting and pleasant artificial lighting?
- Do the residents seem well cared for?
- Are there private mailboxes?
- Are the common areas inviting, clean, and uncluttered and are they busy or empty (dining room, hair salon, theatre, fitness areas)
- How many elevators are in the building?

- What security is in place / fire safety system / how often are the drills?

Residents

- Are residents happy, active, involved in residence life and friendly to me?
- Are the residents clean, well groomed and dressed appropriately?
- Is there a residents' council that I can join and are its minutes posted?
- Are they encouraged to be part of resident life and what evidence is there of this (e.g. family councils and regular conferences)?
- Are the residents my age and in my state of health?
- When can family members visit and when can't they?

- What is the response when I ask residents:
 - *How long have you lived here?*

 - *Why did you move in?*

 - *Does it feel like home?*

 - *Do you like living here? Why? Why not?*

 - *What is a typical day like?*

 - *Would you recommend this community? Why? Why not?*

Staff

- Are staff members professional, well-informed, appropriately dressed and wearing proper identification?
 - Do staff speak respectfully with (and about) residents and address them by first name?
 - Do staff make me feel at home, introduce me to several residents and patiently answer my questions?
 - Was I introduced to the general manager and other key staff members?
 - Marketing staff:
 - Did they accommodate me if I dropped in for a tour?
 - Did they show me a resident's room without the resident's permission?
 - Did they follow up on my visit/enough/too much/at all?
-
- What is the staff/resident ratio in independent living, assisted living and other areas?
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Services and Amenities

- Is housekeeping and laundry service included and can I do my own laundry? If it is done by staff, who marks my clothing?
 - Is there an ATM on site or does a bank visit? Which one and when?
 - Did I receive a copy of the monthly recreation calendar?
 - Are pets allowed to stay with me or to visit?
 - If there is a shuttle bus, how often does it run, what off-site events are included?
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- Can family members stay overnight and what is the procedure?
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- What physical, recreational and educational programs are there and can I volunteer to run one?
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- What entertainment is there and could I ask for something different?
-
- What amenities are there (e.g. hair salon, fitness studio) and what is the cost?
-
- What religious services are available? How often? What denominations?
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- What are the arrangements for smokers?
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Food

- Are special dietary needs catered to: diabetic, low-salt/fat, vegetarian, puree?
- Are meals made from scratch and does the food arrive hot?
- Are there fresh fruits and vegetables at every meal?
- Are there special dinners and mealtime events?
- Is wine or beer served with meals, how often and under what circumstances?
- Is the residence licensed and is there a bar?
- Is there a registered dietician or nutritionist on staff?
- Do residents contribute to meals or meal preparation in any way?
- Is the dining area open to the public?
- Is there an open kitchen so residents can watch the chefs prepare food?

- Is seating assigned for every meal?
- Is there a 24-hour snack area?
- Is there an open pantry or kitchenette stocked with basics (coffee, tea, milk, sugar, biscuits and crackers) on every floor?
- Are there meals from my culture, how often and can I have input in them?

- Can my family or friends come to eat with me? What notice is required, what's the cost and is there a private dining area?

- What training does the chef have?

- How are meals served—buffet, plated, 'hotel-style' room service?

- How many meals are included each day?

- If I don't like one of the day's choices, what are my options if I opt out?

- How big are the portions and what happens if I want larger or smaller ones?

- How often do menus change and do residents have input into menu choices?

- How many sittings are there each day and how much time is allowed for meals and between sittings?

Health and Medical

- Is there a registered nurse on duty 24/7?
- Is there medical and practical assistance (for falls, mobility, toileting) 24/7?
- Is care provided in my suite or only in a medical services area?
- Does the residence accept mobility devices in suites and common areas?
- Are there short-term respite services available if I have a short illness?
- Can I continue to use my own doctor?
- Is there a doctor affiliated with the residence. How often is she/he on site?

- Must I pass a health evaluation to be accepted and what does that include?

- What medical conditions does the residence accept and would I have to move if my health deteriorates?

- What care services are provided in the basic package (independent living, assisted living etc.) and which are extra?

- What other medical professionals are on site and does a lab visit?

- What is the procedure if I have a medical emergency?

- What is the procedure for aging-in-place?
 - In-suite care by the residence's own agency*
 - Outside agencies or private caregivers allowed*
 - Move to another assisted-living section of this residence*
 - Move to another residence e.g. long-term care /nursing home*

Wellness

- Are personal trainers available who specialize in older adult fitness?
 - Are there walking tours?
 - Is there a fitness area with equipment or a pool? What are the rules for use?
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- What kinds of exercise classes are available and what other activities are available (tai-chi, Wii, carpet bowling etc.)?
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Suite

- Will my furniture fit the suite and how much furniture will I need?
 - Is the suite designed with a senior's needs in mind e.g. storage for a walker?
 - Is there adequate natural and artificial light?
 - Are there enough electrical plugs in the right locations?
 - Are bathrooms large enough for a walker or wheelchair and equipped with a safe, accessible tub or shower and assistive devices like grab bars?
 - Can I have alcohol in my suite?
 - Is smoking allowed in my suite?
 - Is the door secure and is there a peephole that is conveniently located?
 - Is the suite number clearly shown on the door?
 - Are the hallways wide, well lit and carpeted?
 - Are there smoke detectors and sprinkler systems in suites, halls and common areas?
 - Are there Wi-Fi and Cable TV and enough phone jacks? What's the cost?
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- Are there kitchens/kitchenettes and what appliances are included/ allowed?
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- Are the floors carpeted, hardwood or tile and do I like the suite finishes?
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- Is there enough closet space, can I build more and for what cost?
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- Is it easy to change suites if my needs change and what is the procedure?
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- How much privacy will I have in my suite?
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- How is the heating and air-conditioning system controlled?
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- How can I keep my belongings secure (locked drawers, a safe)?
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- What kind of emergency communications system does my suite have?
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- How many call bells are there and where are they located?
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- What meal preparation is allowed in my suite and where can I buy food?
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- What changes can I make to things like paint, wallpaper, carpet etc.?
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- What types of suites are available (studio, one and two bedroom), what are the dimensions and what features do they include?
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- How many bathrooms are there and are they privately located?
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Financial

- May I see your most recent resident satisfaction survey?
- May I see the CHIP (care information package) and the Tenancy Agreement?
- Is there a resident trust account maintained?
- Are any subsidies available?
- Do you reduce the rent if a resident is away for an extended period of time?
- Is there a waiting list? For which areas?

- Are trial stays available, at what rate (daily, weekly, monthly) and for how long?

- Are respite stays available, at what rate (daily, weekly, monthly) and for how long?

- How is the rent paid—pre-authorized payment, cheque—and how often?

- What was the last rental increase, how much was it, and what is the notice period for such an increase?

- What are the monthly costs, broken down for suite and care?

- What additional costs are likely (e.g. utilities, laundry, additional personal care, outings, hairdresser)?

- What is the procedure and notice for departure and what happens if the departure is due to a change in health?

- Who owns/manages the residence and what other ones do they own/manage?

- How is the residence governed and how are disputes and complaints received and resolved?

Educational Classes and Volunteering

- Are there volunteer opportunities in the residence or organized with the community?
- Does the residence volunteer or participate in events in the community?
- Can I volunteer to start a group and how will the residence support my efforts?

- What academic and non-academic classes are available on and off-site? and what groups can I join?

Notes

Additional Resources

Where to find help and support in Canada:
www.comfortlife.ca/seniorcareadvisor

Costs of retirement:
www.comfortlife.ca/financing.php

Planning and downsizing:
www.comfortlife.ca/reduce-belongings.php

Additional eBooks:
www.comfortlife.ca/ebooks

CANADA'S BEST RETIREMENT COMMUNITIES

www.comfortlife.ca



READ IT ONLINE!

