

Continuing Care Retirement Community Checklist

You're ready to evaluate a CCRC. Use this checklist to fully assess the quality of your CCRC options, and choose a provider that's right for you. (See nursing home and assisted living checklists to evaluate those units of a CCRC.)

COMMUNITY	CCRC 1	CCRC 2	CCRC 3
Community name			
Community address			
Community phone			
Contact person			
Does the community have an opening?			

LOCATION	CCRC 1	CCRC 2	CCRC 3
Is the surrounding area safe?			
Is there a safe and pleasant place outside for residents and families to sit and/or walk?			
Is there public transportation within walking distance of the community?			

Inquiries are welcomed at info@eldercarehelper.com, 847-475-3200.

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Do family and friends live close enough to the community to visit?			
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THE BUILDING(s)	CCRC 1	CCRC 2	CCRC 3
Are the grounds well maintained?			
Are the townhomes, homes and/or apartments well maintained?			
Are the interior public areas attractive and well maintained?			
Are the private areas, such as townhomes, homes, apartments and hallways attractive, well lit and well maintained?			
Is the kitchen clean?			
Are all areas free from odors (of urine, feces and/or strong chemicals)?			

AMENITIES	CCRC 1	CCRC 2	CCRC 3
Public sitting room(s)?			
Dining room(s)?			
Snack bar?			

Activity room?			
Gym?			
Pool?			
Beauty salon?			
Entertainment Room(s)?			
Computer room?			
Space for religious services?			
Other?			

INDEPENDENT LIVING	CCRC 1	CCRC 2	CCRC 3
Which of the following types of units are offered: houses, townhomes, apartments?			
What unit types are available: studios, 1 bedroom, 2 bedroom, 3 bedroom, other?			
Is the community responsible for exterior maintenance of units?			
Is the community responsible for interior maintenance of units?			

Is the community responsible for landscape maintenance?			
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SERVICES	CCRC 1	CCRC 2	CCRC 3
How many meals a day can be purchased?			
Are there menu choices at each meal?			
What types of special diets are available?			
Does the food look, smell and taste good?			
Are friends and family allowed to join residents for meals?			
Are snacks available throughout the day?			
How often are independent living units cleaned?			
How often is laundry service available?			
Does laundry include personal items?			
Are there daily activities?			

Are there regular organized outings?			
Does the community provide transportation for outings, medical appointments, shopping, religious services or other activities?			

CARE	CCRC 1	CCRC 2	CCRC 3
Is health care available?			
Is there a pharmacy on site?			
Which, if any, of the following medical services are available on site in addition to healthcare: podiatry, dentistry, optometry, other?			

CURRENT RESIDENTS	CCRC 1	CCRC 2	CCRC 3
Do residents recommend this CCRC?			
Are residents engaged with activities?			
Do staff members interact pleasantly with residents?			

Do staff members know residents by name?			
Is there an active Resident's Council?			

STAFFING	CCRC 1	CCRC 2	CCRC 3
Is a registered nurse (RN) or licensed practical nurse (LPN) on site during the day?			
Is a RN or LPN available at night?			
Is there a dietitian on staff?			
Is there a social worker on site during the day?			
Is there an activity person on site during the day?			
How many years has the current director been employed at the community?			
How many years have staff members worked at community on average?			

POLICIES & PROCEDURES	CCRC 1	CCRC 2	CCRC 3
Are residents allowed to have family members, such as a grandchild, visit over night or for a few days?			
Are residents allowed to have pets? Are there limitations on size, type or number, etc.?			
How does the community decide when a resident should move to a higher level of care?			
Are residents permitted to hire a private caregiver to assist with personal care?			
Are residents who hire a private caregiver allowed to age in place?			

THE CONTRACT & COSTS	CCRC 1	CCRC 2	CCRC 3
Is an initial deposit required? if so, how much is it?			
How much of the deposit is returned when the resident moves or is deceased?			

Monthly charge for a studio			
Monthly charge for a 1-bedroom unit			
Monthly charge for a 2-bedroom unit			
Monthly charge for a 3-bedroom unit			
Does the CCRC offer LifeCare Contracts? Modified Care Contracts? Fee for Service Contracts? Other types of contracts?			
What services are covered in the base contract price?			
Cost of additional services, such as meals, housekeeping, laundry, activities, transportation or other services			
Monthly charge for higher levels of care			
Are there other charges?			
Under what conditions do rates for care or other terms change?			

Are financial statements available for inspection?			
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LICENSURE & ACCREDITATION	<i>CCRC 1</i>	<i>CCRC 2</i>	<i>CCRC 3</i>
Is the CCRC assisted living unit licensed (if applicable, in your state)?			
Is the CCRC nursing facility licensed and in good standing?			
Is the facility accredited by any accreditation organization?			

Notes and Personal Impressions: