



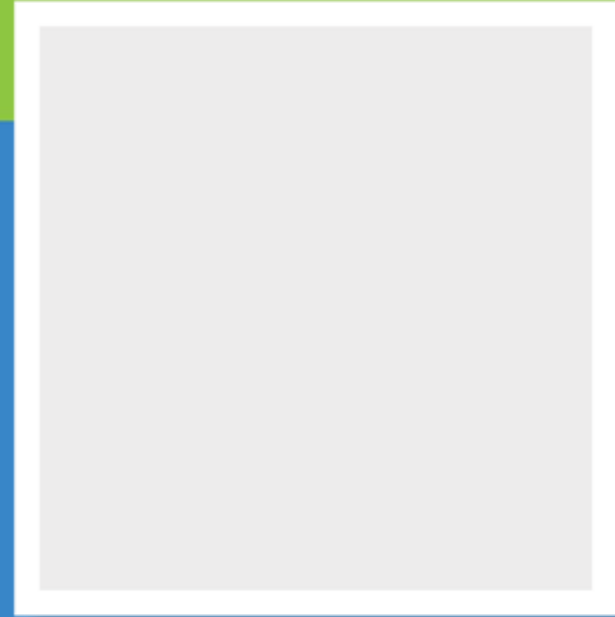
**How to choose a
senior community that
meets your needs—
today and tomorrow.**

Welcome!

**Thank you for
joining me today!**

**And thank you
to our hosts today:**

[host name]



Presenter Name

Company Name

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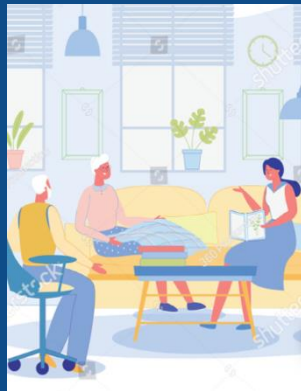
Today's Plan:

- How to put your needs and priorities front and center!
- How to get past the sales pitch to the “nitty gritty”
- What to watch for when you tour: quality, safety and a match to your needs and priorities (or not!)

It's a big decision. A good process helps!



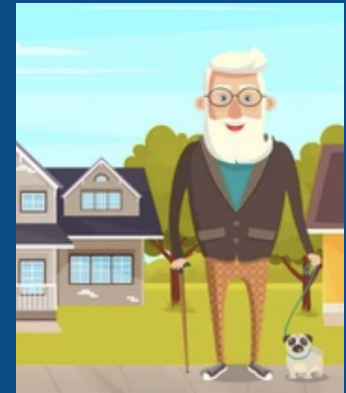
1. Take Stock



2. Decide on Type of Community



3. Phone Screen Top Prospects



4. Tour Top Prospects

All are alternatives to aging in place.

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Step 1

**Take stock. What's
important to you?
What's not?**

What are your needs, wants and priorities?



Start with Good Conversations



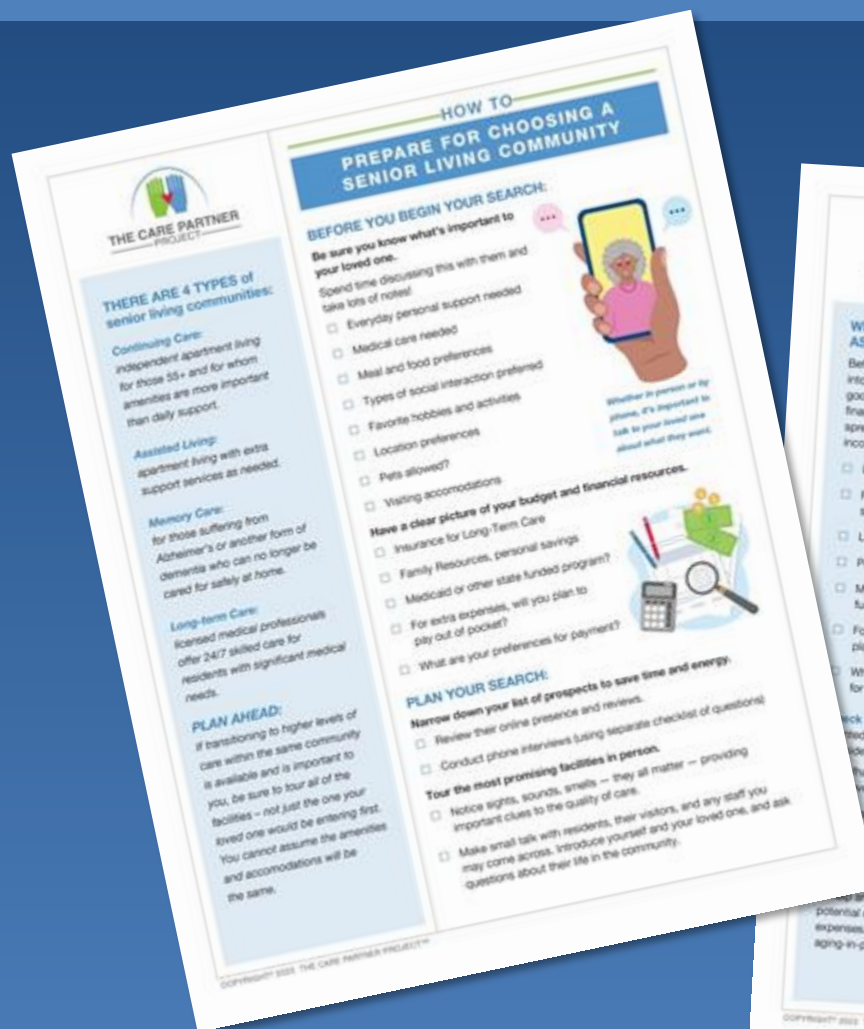
MAKE YOUR LISTS!

There's a lot to life: cover it all!

What's important to you? List it!

- Personal Preferences
- Travel & Outings
- Everyday Routine Support
- Visiting Arrangements
- Medical Support
- Location Preferences
- Meal & Food Preferences
- Pets
- Social Interactions
- Finances & Contracts
- Hobbies & Activities

To help you, download free checklists from The Care Partner Project



Use to simplify and
organize your search!

Talk, listen, open hearts and minds - take notes!



Step 2

What *Type* of Community Offers the Best Fit for Needs, Wants & Priorities?

Quality, Safety, Fit for Evolving Needs

Continuing Care Communities (CCRC)

Offer 3 or 4 levels of care to support changing needs.



Independent



Memory Care



Assisted Living



Long-Term Care

- Possible substantial upfront investment, plus ongoing monthly fees.
- A long-term contract may be required.



Independent Living (IL)

Apartments or small townhouse homes plus a range of activities and amenities:

- sports facilities
- meals
- housecleaning
- transportation for shopping, doctor appointments, etc.
- community and off-campus social activities





Potential unwelcome surprises and problems!

- In Continuing Care communities, Independent Living may be significantly more attractive, “buttoned up” and amenity-rich than their Assisted, Memory, Long-term care facilities. **Check out all of them before you commit!**
- For Assisted Living and Memory Care, **lock in specifics *in writing* about all services included in monthly fees** plus any extra costs for additional assistance beyond medication management.
- Any planned construction or renovations? Either in the community or area around it.

MARGARET'S STORY

The "Ritz" of
Independent Living
is the frumpy **Motel**
of Assisted Living



Assisted Living (AL)

Help with daily living

Compact apartments
with small kitchens
and small appliances
(no ovens or
dishwashers)

Meals served in
dining rooms



Assisted Living Community: What to Expect

Help with daily living

- Dining room meals with menu options
- Housekeeping and laundry services
- Medications administration (always by staff)
- Showering, dressing and other support services for daily needs



COSTS VARY WIDELY
Not covered by
Medicare or Medicaid

Memory Care Communities (MCC)

Help for body and mind

Geared to those diagnosed with dementia, small studio-type apartments are set up to offer a simple and (ideally) safe environment for those with impaired daily living skills.



Memory Care

- **Exterior doors are locked** for residents' safety
- **Communal meals only**
- **Medication** is always administered by staff
- **Staff will help as needed** with showering, dressing, eating, and toileting
- **Expect costs to be higher**
- **Not covered by Medicare or Medicaid**



CAROL'S STORY



Carol, who longed to see her mother, repeatedly fell while trying to reach the door.

Long-Term Care (LTC)

Rehab after surgery or care during serious, long illness

- Medication therapy
- Physical therapy
- Feeding tube
- Urinary catheter care
- Will offer or help arrange for also of palliative or hospice care if needed
- May be covered by Medicare or Medicaid
- May/may not be covered by Medicare Advantage – CHECK!



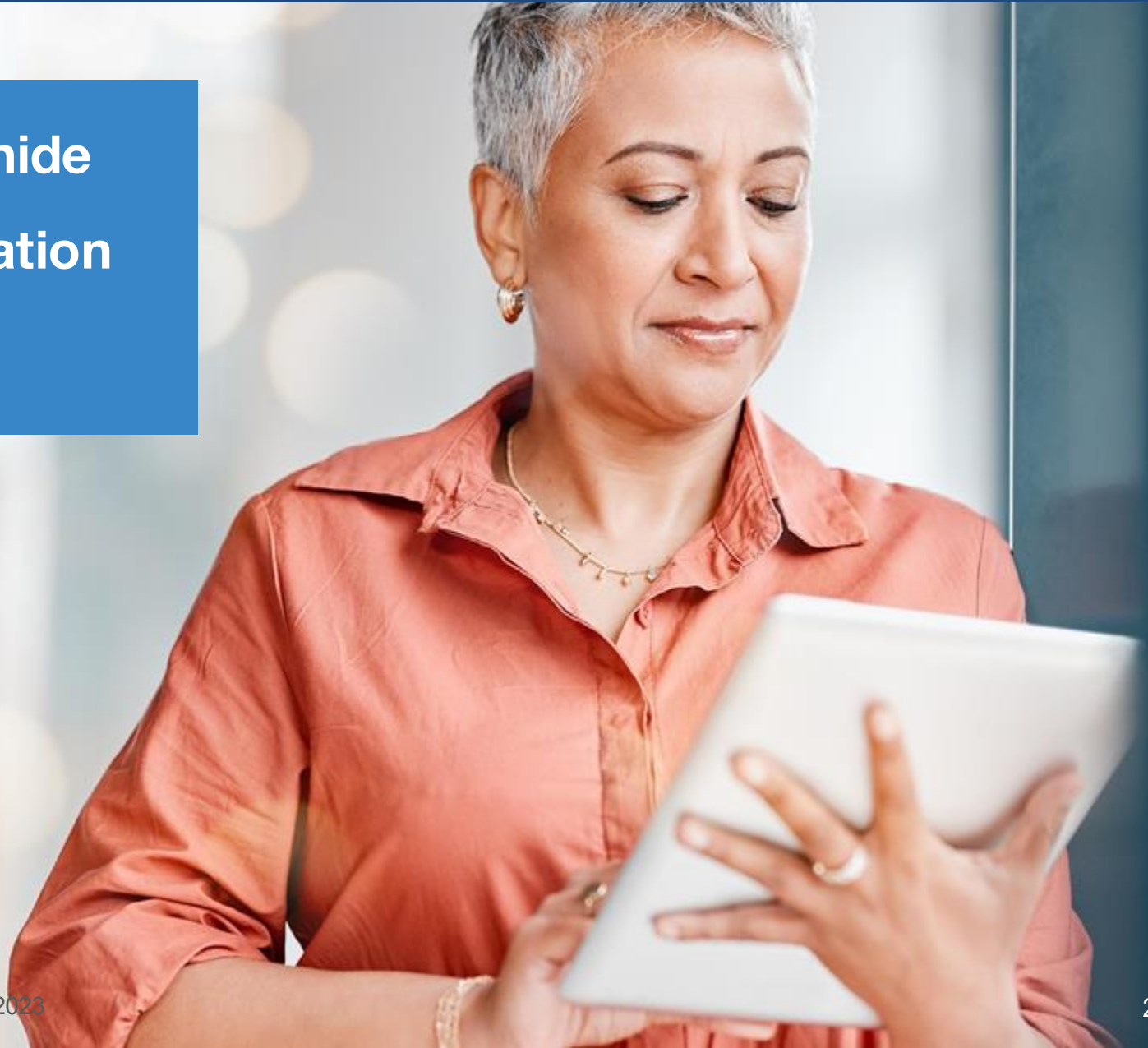
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Step 3

Call Top Prospects and Quiz Them!

Check online reviews. “Ask around.” Ask a nurse!

**It's hard to hide
a bad reputation
these days!**



Let your fingers do the walking – phone first!

- Follow your checklist
- Remember, they are selling! Keep pressing for answers
- Take notes!



Your phone interview: key questions to ask

1. Levels of Care
2. Licensing
3. Staffing and credentials
 - RNs, clinical staff
 - Medical/doctors
 - Geriatricians
 - Staff-to-resident ratio
 - Frequency of rounds
 - Ongoing, professional staff training *(ask for details, e.g., Teepa Snow training)*



This is your first pass to weed out those that don't match your needs and preferences.

Your phone interview: key questions to ask

5. Services

- Medical, dental, and physical therapy
- On-site medical clinic?
- Meals, menus

6. Units, Sizes, Amenities

- Personal (hair salon, gym)
- Activities (type, frequency)
- Transportation for shopping, appointments

7. Costs and Contracts

8. Availability, waiting lists?



Download our FREE phone interview checklist!

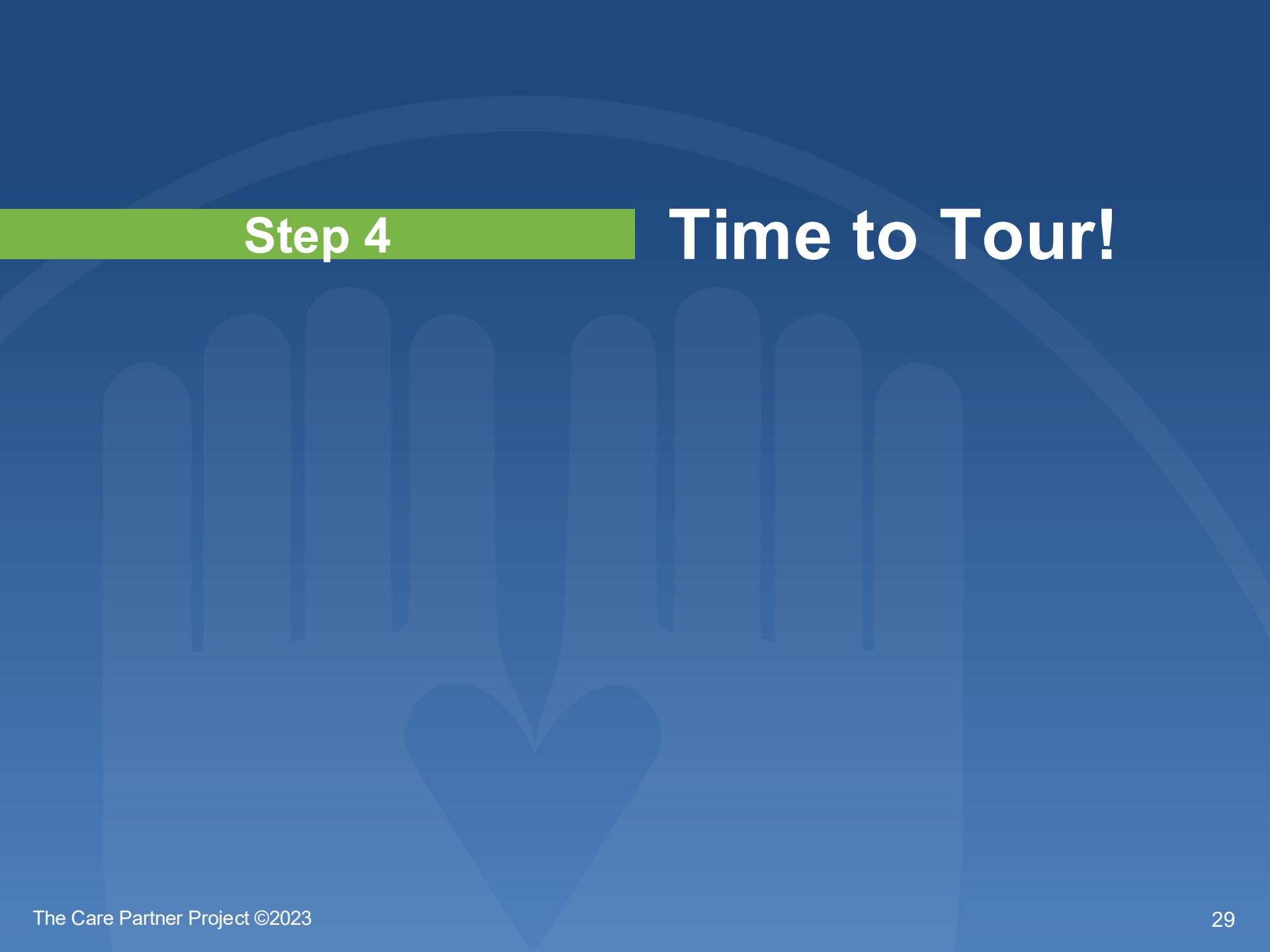


RED FLAGS

Not necessarily “deal breakers,”
but good details to sweat

Possible signs of poor quality, risky care, & other concerns...

- Pressure for you to come in for a visit instead of spending time with you on the phone/short answers/person doesn't know answers/won't refer you to others
- Unsafe staffing ratios (no hard/fast ratio: compare answers across all options
Inadequate licensing, no commitment to ongoing training for staff
- Lack of Registered Nurses, doctors, geriatricians, regular staff training
- High staff turnover (“ask around” among friends, neighbors, others)
- Poor supervision (no/infrequent rounding by senior administration) Ask around!
- Poor reputation, “horror stories” when you ask around

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Step 4

Time to Tour!

Tour with your senses

for quality and safety clues!



LOOK for...

- clean surroundings
- contented people



SNIFF for...

- yucky odors
- freshness



LISTEN for...

- kind voices
- calm vs chaos



TASTE...

- the food



RED FLAGS

Not necessarily “deal breakers,”
but good details to sweat

- What you see doesn't line up with what you were told when you called
- Residents appear unkempt
- You don't hear any happy voices! Staff is grumpy, sour, unfriendly and residents appear bored, sad or listless
- You see staff on personal phones! You see staff sitting around, doing nothing
- Odd smells, bad smells come from residents, their rooms or public areas
- Unclean public bathrooms
- Unclean residents' bathrooms
- Interactions with residents
- Poor quality of food, nutritional content

Special considerations for couples

- Interview will be necessary
- Medical records are reviewed
- A nurse and doctor must certify that one person in the couple can safely live on their own without additional assistance
- “Hybrid apartments” may be available: one person in the couple may receive medication management support, help with dressing, bathing or other assistance that is needed for wellness and safety



Financial criteria for acceptance

- Be prepared to share your entire financial picture
- Ask what resources are needed to qualify
- Look for details: annual increases, extra possible fees like transportation, haircut services, food delivery to unit, assistance while walking. Many more!
- Faith-based community?
Ask about financial assistance



Review details with a lawyer, accountant, financial planner, possibly another family member or trusted friend.

Navigate Costs and Contracts

- Deposit needed to hold, additional 10% required to do medical screening/application
- When get money back in the event of death or decision to leave (have to wait for two years or until the apartment is sold)
- If you “give it a try,” what are the \$\$\$ implications?



Review details with a lawyer, accountant, financial planner, possibly another family member, or trusted friend.

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**You've made a decision.
Now what?**

Start with your move-in date...

Lots of logistics — make your plan, make your lists!

- Will your new unit need renovations? Or is it move-in ready?
- Cost of renovations?
- Have a house to sell?



What is your moving plan?

- Downsizing?
(Time is of the essence!)
- Have family or friends to help with the move?
- Need a mover?



Will your new community help with any of these details?
(If so, Included in your fees, or not?)

You've moved in!

Get involved! This is your last quality and safety check. If anything **does not match up** to what you were promised, **act quickly**.

- Ask for a meeting. Include your trusted family, friends, any advisors who helped you with the search and your contract.
- Use your Care Partner Project checklists and notes you kept during your search. Use these notes to explain or back up any concerns you have.
- Expect accountability:

Ask for “fixes!” Details, and timing (When?)

Get promises in writing!

Feeling overwhelmed?

There's help!

Reliable, **independent*** professionals

- Certified Senior Advisors
- Patient Advocates

***Independent** means not paid by any senior community, not paid a referral or "finder's" fee. Senior Care Authority and Care Patrol are examples, not endorsements. Search in your area for these and similar consultants.*





QUESTIONS? IDEAS?
LET'S TALK!

Thank you!

If this presentation was helpful to you, kindly spread the word about it with your groups in our area.

I speak on other topics, as well. (In person or on ZOOM.)

Just call or drop me a note!

Presenter:
Insert your
headshot here.

Your Name

Credentials

Company Name

Phone Number

Email