

CCRC Evaluation Checklist for [facility NAME HERE]			
Lifestyle Considerations	Considered	Score 1-10	Notes
Physical plant (the layout and aesthetics of the grounds; the condition and maintenance of the buildings, apartments, dining halls and other common areas, etc.)	<input type="checkbox"/>		
Food	<input type="checkbox"/>		
Neighbors and friends	<input type="checkbox"/>		
Staff responsiveness	<input type="checkbox"/>		
COVID	<input type="checkbox"/>		
Proximity to family	<input type="checkbox"/>		
Legal Considerations			
Model (type A: full risk, type B: partial risk, type C: fee for service, type D, equity models)	<input type="checkbox"/>		
Price maintenance and stability	<input type="checkbox"/>		
Attorney Review	<input type="checkbox"/>		
Financial Considerations			
Organization Financial Strength	<input type="checkbox"/>		
Monthly payment	<input type="checkbox"/>		
Occupancy	<input type="checkbox"/>		
Rate Increase History	<input type="checkbox"/>		
Entrance Fees	<input type="checkbox"/>		
Debt rating	<input type="checkbox"/>		
Profitability	<input type="checkbox"/>		
Capital Improvement	<input type="checkbox"/>		
Reserves	<input type="checkbox"/>		
Residents role (seats on board or advisory committee)	<input type="checkbox"/>		
Tax Deductibility	<input type="checkbox"/>		
CPA Review	<input type="checkbox"/>		
For Profit vs. Non-profit	<input type="checkbox"/>		