



BUCKELEW

REALTY GROUP

BASIC QUESTIONS

How long has your community been in existence?

Are you a not-for-profit 501C3 or corporately owned? If corporately owned, what is the name of the corporate owner? If family owned, what is the name of the ownership group?

Has your community name changed? If yes, when, how many times, and why?

What is the mission of your community?

Are you affiliated with any churches, universities or municipalities? If so, what does that affiliation entail? What are the perks? Are there financial connections, etc?

What is the current occupancy rate? In other words, how many units are available versus occupied. Ask for the ratio. (90% or better is great; 80% or better is good; under 80% is possibly concerning; 70% or below might indicate significant problems).

Is there a waiting list? If so, how many people are on it and how does it work? What happens if you decline an opening? Ask how they prioritize the list?



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MANAGEMENT AND OPERATIONS

Does your community contract with a management or consulting company to manage the day-to-day operations? If so, what is the name of the company and how long have they been in place?

How long has the current management team been in place? (i.e. CEO or Executive Director, marketing director, business manager, activities/wellness director, dietary services manager). If they are licensed like assisted living, memory care, or longterm care, ask about Directors of Nursing and administrators.

How much input and/or involvement do residents have in regard to the management of the community? Is there a resident council? What is their role? Ask to speak with the president/leader of this group (they may have different names per community).

Who is the FINAL decision-maker when it comes to changes within the community's operations and care?

Ask to meet the CEO or Executive Director/Administrator. Ask about their leadership experience. Get to know them. Do they communicate well? Do you feel comfortable talking with them? Are they willing to give you time? (This is usually 2nd or 3rd visit - once you have narrowed down your choice of communities).

Do they have an emergency plan in place for things like: 1) Another pandemic, 2) Tornadoes, 3) Power outages? During the 2020-2021 pandemic, how did the retirement community operate and what were their protocols? What would they do the same and what would they change? What policies were put in place during this time?



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FINANCIAL

Do you have an “entry fee” (sometimes referred to as a “buy-in”). If so, what guarantees does this fee provide? Do they offer a Life Care contract and if so, what does that involve?

If there is NOT an entry fee, what is the amount of the “community fee” if any? What does this cover and is it refundable?

What is included in your monthly service fee? What might cost extra? (i.e. pets, covered parking, transportation out of area, room service, personal care support, cable/wi-fi, laundry, etc.).

What are your annual rate increases? Yearly increases of 3-8% are common. Ask to see the annual service fee rate increases for the last 3 years.

In communities with long-term nursing care, ask if the fee includes a private room or semi-private room. If you want a private room and it is not standard, what would the additional charge be?

Do they have any move-in incentives? If so, can you choose your own relocation services (i.e. move managers, movers, etc.) or do they try to control your choices?

What happens if someone outlives their money due to no fault of their own? How is this handled by the community?



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If they are a CCRC (Continuing Care Retirement Community), ask to see their financials and most recent audit (this is usually something you do on a 2nd or 3rd visit - after deciding you may be interested in the community). Ask about bankruptcies or defaults on bonds/loans and how any matters like this are being handled.

CARE

Do you offer any licensed care such as skilled nursing (for post-hospital stays), memory care, and/or assisted living?

What level of licensure do they hold? Are there situations whereby a person may not be able to live there after they move in (i.e. one or two person assist, ability to ambulate up and down stairs, specific medical care required, etc.).

Are healthcare-related apartments private or semi-private? Is there an additional charge for private? Insist on taking a tour of these areas within the community (even if you don't need them yet).

What is the staff to resident ratio of hands-on staff? Does this vary based on time of day or on weekends? If so, what are the differences and why? (This is mainly for licensed communities with a healthcare component).

What happens if you need more care than can be provided by their community? Do they have designated staff or resources to assist you with locating and moving to a new place?



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What is the protocol for when someone pulls the emergency cord in their room or in a public space?

What training do staff members in the memory care area have? Are they trained in dementia care specifically?

If so, ask to see the most recent state inspections (or plan to look them up on your own after your tour).



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LIFESTYLE AND AMENITIES

What activities are offered on and off campus? Who leads the activities and how long has this person been in place? What are their qualifications (i.e. specialized training, education, experience)?

Are all levels of care under one roof or must you go outside to access other buildings?

Is there transportation available? If so, is it included in your service fee? Where will they take you and when? Will the driver escort you into buildings if requested? Does the driver have any specialized training (CPR, fall prevention, etc.)? If you use a wheelchair or scooter, can they transport it?

Are religious services offered on site? If so, when and what type?

What are your policies for alcohol use, smoking, and firearms?

What is the pet policy? Is there a pet park on site? Where is it located and is it fenced?

Can I use an electric scooter inside the building?

Are there on-site services like hair salons, massage, etc.? If so, what are the fees?

Ask to talk with people who live there. Sit with them over a meal and about their experience of the community. What do they like and what do they not like? How do they describe the community, the residents, the staff, the way of life there?



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FOOD

What is the dining experience like? Is it buffet style, full menu, set menu, etc?

How many meals are included in your fee and what are the hours for each meal?

Is the seating open or are people assigned to a specific table?

How are special dietary needs handled?

Is room service available and if so, is there an additional fee?

If gone for extended periods of time (month or more) during the year, is the meal plan prorated?

NOTE: Eat meals a few times at the communities which you are strongly considering. Take time to eat on different days, with different people, and show up unannounced at least once for lunch. Observe whether the experience is the same or different when you are expected versus not expected.



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APARTMENTS

What is your process for updating apartments/units when people move out? Can new residents choose colors, flooring type, etc?

How are any charges for upgrades handled?

Is there a guest apartment that I can reserve for family or out of town guests? If yes, what is the typical availability?

What is the policy for changing apartments as a current resident?

How secure is the community? Are doors locked during certain hours and if so, how do residents gain access?

What areas in the community are considered “common areas” and can they be reserved?

Can I place furniture outside my apartment? On the patio? In the corridor?

If you drive, where is parking in proximity to the entrance you would use?



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TAKE NOTE AND OBSERVE THE FOLLOWING

How active, engaged, friendly, and welcoming are the residents and staff?

Are the staff members you encounter courteous, well groomed, and available?

Is the community well kept or are there obvious signs of deferred maintenance?

Do the activity boards include events that appeal to you?

How were your questions handled? Were they transparent and open or reserved and cautious when you asked questions about finances, care, inspections, etc?

If you drive, what is the traffic and parking situation?



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AS YOU NARROW IT DOWN

Check the Oklahoma state surveys for licensed communities like nursing and assisted living at <https://surveys.health.ok.gov/> (Click the *SEARCH* tab at the very top left of the page to select the type of community. Then, type the name of the community on the following page to access their state surveys).

NOTE: Independent living communities (without a healthcare service) are NOT licensed with the state, so you will not find surveys or ratings for these communities.

Make appointments with the appropriate management or staff members to talk about things like the financial stability of the organization, special dietary or care needs, and other important issues.

DID YOU KNOW?

Tours of senior living communities are complimentary for clients of Buckelew Realty Group who are planning ahead. We are happy to assist you with selecting communities that meet your needs and criteria, scheduling personal tours, and helping you evaluate your options. You are also encouraged to join us for monthly meetings of the Oklahoma Downsizers Clubs where we gather to support those who are planning a future move.