

A LIGHTHOUSE PLANNING TOOL

The Portland Family's Senior Living Tour Checklist

A practical guide for comparing assisted living, memory care, and adult foster homes around the person who will actually live there - not just the lobby you see on tour.

Person considering care	Tour date	
Provider / community	Person leading tour	
Location	Phone	

BEFORE THE TOUR

Know the needs you are trying to meet.

Write down the current reality. Clear information helps a provider give you a more accurate answer about fit and cost.

- ☐ Mobility and transfers: independent, one-person assist, two-person assist, wheelchair, lift, or fall risk.
- ☐ Personal care: bathing, dressing, toileting, continence, eating, and nighttime support.
- ☐ Cognition and behavior: memory loss, wandering, anxiety, agitation, sleep disruption, or poor safety awareness.
- ☐ Clinical needs: medications, insulin, oxygen, wounds, injections, therapy, hospice, or special diets.
- ☐ Personal priorities: location, faith, food, social life, pets, privacy, language, routines, and family access.
- ☐ Financial range: sustainable monthly budget, payment source, long-term care insurance, and home-sale timing.

Top three non-negotiables

FIRST IMPRESSION

- ☐ Residents appear known by name and treated with patience, warmth, and dignity.
- ☐ The environment is clean, calm, and consistent with how your loved one prefers to live.
- ☐ Leadership is visible and answers detailed questions directly rather than relying only on sales language.

02 | CARE, STAFFING & SAFETY

Care planning

- ☐ Who completes the pre-move assessment, and will we receive a written cost estimate based on it?
- ☐ Who creates the service or care plan, and how often is it reviewed or updated after a change?
- ☐ Can you safely support the needs we described today? Which changes could require a transfer or move?
- ☐ How do you communicate changes, incidents, falls, medication concerns, or hospital visits to family?

Staffing

- ☐ Who is physically present during the day, overnight, and on weekends?
- ☐ How are call-outs covered, and how often does the resident see temporary or agency staff?
- ☐ What training and experience do caregivers have with dementia, transfers, falls, behaviors, and hospice?
- ☐ Who is the decision-maker when a care need changes after normal business hours?

Medication and health support

- ☐ Who manages, administers, and reorders medications? What is the monthly medication fee?
- ☐ How are new orders received, documented, and communicated to the family?
- ☐ How are urgent concerns handled, and which situations automatically lead to 911 or the emergency department?
- ☐ Which visiting providers are available - primary care, home health, therapy, podiatry, dentistry, or hospice?

Safety

- ☐ How are falls, wandering, elopement risk, emergencies, power outages, and evacuations handled?
- ☐ Are bathrooms, hallways, exits, outdoor areas, and overnight supervision appropriate for this person's needs?
- ☐ May we review the provider's current Oregon licensing and inspection information?

Notes

03 | COST & DAILY LIFE

Understand the complete price

- ☐ What is the base monthly rate, and exactly what does it include?
- ☐ How are care charges calculated - tiers, points, time, or individual services?
- ☐ What additional fees apply for medications, transfers, escorts, incontinence, nighttime care, laundry, transportation, or special diets?
- ☐ Are there deposits, community fees, assessment fees, move-in fees, or minimum-stay requirements?
- ☐ How often can rent or care charges increase, and what notice is provided?
- ☐ What is charged during a hospital stay, rehabilitation stay, vacation, or after notice is given?

Base monthly rate	\$	Estimated care	\$
Medication fees	\$	Other monthly fees	\$
One-time charges	\$	Estimated total	\$

Daily life

- ☐ What does a normal weekday and weekend look like for someone with similar interests and abilities?
- ☐ How flexible are wake-up times, meals, bathing schedules, bedtime, visitors, and trips with family?
- ☐ Can the provider accommodate preferred foods, cultural traditions, faith practices, pets, and hobbies?
- ☐ How are residents encouraged to participate without being pressured or isolated?
- ☐ What transportation is available, and what does it cost?

Watch a real moment

Pause during the tour. Notice how staff speak to residents, whether requests are answered, whether residents appear comfortable, and whether the daily atmosphere matches the promises being made.

What felt especially right?

What concerns need a direct answer?

04 | COMPARE & DECIDE

Compare the fit - not just the features.

Complete this page soon after each tour while the details are still fresh. Use 1 for poor or unclear and 5 for excellent.

Category	1	2	3	4	5	Notes
Ability to meet current care needs						
Confidence about future needs						
Staff warmth and consistency						
Safety and clinical communication						
Daily life and personal fit						
Transparency of total cost						
Family communication and trust						

Before signing

- ☐ Review the residency agreement, current fee schedule, refund terms, and move-out provisions.
- ☐ Confirm in writing that the provider assessed the person and can meet the needs disclosed.
- ☐ Review current Oregon licensing and inspection information for the specific provider.
- ☐ Know who will coordinate medications, equipment, transportation, records, and move-in day.

The question we still need answered

Our next step and who owns it

Need a focused local search?

Lighthouse helps Portland-area families compare appropriate senior care options, coordinate tours, and understand the next step. Placement guidance is provided at no cost to families.

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Educational tool only. Provider capabilities, licensing, availability, pricing, and individual care needs vary. This checklist is not medical, legal, financial, or benefits advice.