

Rate from 0 - 5			
0 - Not included or not available			
1 - Available but not acceptable in your opinion			
2 - Acceptable with room for improvement			
3 - Average			
4 - Above Average			
5 - Exceptional			



Community Location and Condition	Atherton	Other Community	Other Community
Is there an international airport nearby?	YES		
Do you like the Community's location?			
Is this location convenient for visiting friends and family?			
Is there an obvious commitment to cleanliness and "curb appeal"?			
Does the city offer cultural, symphony, sport venues?	YES		
Does the Community have a welcoming, non-institutional look?			
Does the Community have ample parking for residents who own cars?	YES		
Is public transportation easily accessible?	YES		
Is the Community within easy walking distance of grocery, banks, restaurants, etc.	YES		
Does the Community feel like a neighborhood?			
Do you like the Community's "ambiance"?			

Safety & Security	Atherton	Other Community	Other Community
Is the Community Gated?	NO		
Is there 24/7 Security personnel?	YES		
Is there a regular system of daily safety checks for all residents?	YES		

	Atherton	Other Community	Other Community
Are there safety and communication features in each individual home?	YES		
Are security pendants available?	YES		
Is there a nurse available 24 hours a day?	YES		

Community Staff and Residents	Atherton	Other Community	Other Community
Were you greeted by friendly, professional staff?			
Are staff members professionally dressed and wear name tags?			
Are visits with Residents encouraged and welcome at any time?			
Do you notice Residents being physically active or otherwise engaged?			
Do the Residents you see around campus appear content?			
Does the mood seem friendly, active, and energetic?			
Do the staff know and engage with the residents?			
Did the Sales Counselor customize your visit with your specific needs and time?			

Did you receive clear information and answers to your questions?			
Did you feel listened to?			
Atmosphere	Atherton	Other Community	Other Community
Are common areas clean, bright and inviting?			
Are furnishings in good condition and laid out in an accessible way?			
Is there a Concierge available during normal business hours? Weekends?	YES		
Are common areas clearly marked?			
Amenities and Activities	Atherton	Other Community	Other Community
Is there a weekly activities calendar published and posted?	YES		
Is there a Wellness Center/Wellness Program available to you?	YES		
Are the fitness and amenities areas clean?	YES		
Are there resident-based groups of personal interest to you?			
Are the following available within the community? (Rate 5 for all that are offered)	Atherton	Other Community	Other Community
Business Center	5		
Barber/Beauty Salon	5		
Arts and Crafts Rooms	5		
Indoor Pool/Spa	5		
Array of exercise classes	5		
Fitness Center w/equipment	5		
Physical Therapy center	5		
Dermatologist	5		
	Atherton	Other Community	Other Community
Dentist	5		
Podiatrist	5		
Optometrist / Ophthalmologist	5		
Psychiatrist/Psychologist	5		
Library	5		
Meeting Spaces available for clubs, gatherings, and parties	5		
Wood Shop	5		
Billiards and Game room	5		
Volunteer Opportunities	5		
Community Shuttle	5		
Transportation	Atherton	Other Community	Other Community
Is transportation provided outside the community?	5		
Is there weekly transportation to shopping at no charge?	5		
Is transportation provided to Doctors, Dentists?	5		

Is transportation provided to or from the airport?	5		
Ownership Information			
	Atherton	Other Community	Other Community
Is this a single community or "one of several under the same" ownership?	Single		
Is Community for profit?	NO		
Is Community non-profit?	YES		
Any accreditations/ratings?	YES		
Is there a governing Board of Directors/number of members?	YES - 14		
Are Board Members compensated?	NO		
Is this CCRC governed by any State Agency?	YES		
Is there a Resident Council?	YES		
Is there resident participation on the Board of Directors?	YES		
Independent Living Areas and Accommodations			
	Atherton	Other Community	Other Community
Does Community offer Independent Living homes, condos, and apts.?	YES		
Are all appliances furnished, including washer & dryer?	YES (some exceptions)		
Is there adequate storage in the living unit you prefer?			
Is there a thermostat in each living unit?	YES		
Is there sufficient closet space in the living unit you prefer?			
Are kitchens nicely equipped; provide adequate storage?			
Is the type of home you want presently available?			
Did you like the floorplans and finishes presented?			
Are handrails installed in all baths?	YES		
Is there storage for RV's, boats and other recreational vehicles?	YES		
Are pets permitted?	YES		
Can a Resident make modifications to their unit at their cost?	YES		
Costs to incoming Resident			
	Atherton	Other Community	Other Community
Is there an Entrance Fee with no equity in real estate?	YES		
Is there an Entrance Fee that includes equity in real estate?	NO		
Are there multiple Financial Plans?	YES		
Is there a monthly service fee for Residents of the community?	YES		
Do the Monthly Service Fees increase from year to year, historically?	YES		
What range of increase has been demonstrated from year to year	2% - 4%		
Which of the following are included in the Monthly Service Fee?		Other	Other

(Rate 5 for all that are offered)	Atherton	Community	Community
Meal Plan	\$150 incl		
Gas/Electric	5		
Water/Sewer	5		
Bi-weekly Housekeeping	5		
Flat Laundry	available		
Basic Cable TV	Courtyard only		
Internet Service in residence	Courtyard only		
Telephone	Courtyard only		
Lawn Maintenance	5		
In home/apt. maintenance	5		
Community transportation: Shuttle	5		
Wellness programs	5		
24 Hour Emergency Response system	5		
Insurance and Medicare paperwork assistance	5		
Food		Other	Other
	Atherton	Community	Community
Were you offered an opportunity to dine?			
Food quality, prepared to order?			
Presentation of food			
Are there multiple dining venues	YES		
Is there a meal plan included in the monthly fee	YES		
Is there flexibility with the meal plan	YES		
Food Service			
Wait Staff demeanor/friendliness			
Dining room appearance			
Overall dining experience			
Can additional services be provided and billed to Resident monthly		Other	Other
	Atherton	Community	Community
Additional meals	YES		
Guest meals	YES		
Additional housekeeping services	YES		
Home healthcare	YES		
Laundry Services	YES		
Concierge Services	YES		
Individualized Transportation	YES		
Guest room reservations on campus for visiting Family/Friends	YES		
Financial Performance		Other	Other
	Atherton	Community	Community
What is the current percentage of occupancy in Independent Living?			
If you requested, were you provided with the most recent financials?			

Does this CCRC have a positive net worth or sound financials?	YES		
Does this CCRC garner income from donations, endowments and/or investments?	YES		
Does this CCRC provide benevolent care to those who outlive their funds?	YES		
Has this CCRC ever asked a Resident to move because they ran out of money?	NO		
Did your Sales Counselor provide you with the IRS tax deduction information?			
OTHER COMMENTS & ISSUES:			

