

# Choosing an Assisted Living Facility Checklist

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**A Checklist to Help You Choose the "Right" Assisted Living Facility for Yourself or a Loved One**



**Over 650 items to be considered when choosing an Assisted Living Lifestyle for yourself or a loved one**

**Retail Price: \$24.95  
Retail Value: ∞**

# **CHECKLIST**

**for Choosing an**

## **ASSISTED LIVING FACILITY**

**for Yourself or a Loved One**

Over 650 items to be  
evaluated when selecting  
an Assisted Living Facility.

**By**

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**To my mother,  
Dorothy L. Murray,  
who taught me to  
appreciate the wisdom and courage  
of the elderly.**

## INTRODUCTION

Assisted Living is a living style option for seniors, offering a residence, housekeeping, and personal care services, as well as safety, companionship, and medication management. It stresses independence, dignity, individuality, and privacy while offering 24-hour assistance if needed. Assisted Living is not an institution and is not appropriate for those who need Skilled Nursing Care. It is not a Nursing Home.

Selecting an Assisted Living Facility for yourself or a loved one is an important decision as it will greatly influence the quality of daily living for the latter part of one's life. This is not a decision to be taken lightly. There are many facilities available, some are excellent, and unfortunately some are poor. Because this decision is so important, it is often an emotional and stressful one. This checklist is designed to help take some of the emotion out of the decision-making process by focusing on many of the important factors that need to be considered. Utilizing this document will enable you to easily compare facilities, prioritize your needs, and assist you in choosing the Assisted Living Facility that best suits your or your loved ones expected lifestyle.

If you are a family member placing a loved one with Alzheimer's Disease or Dementia in an Assisted Living Facility, your needs and concerns are unique and are addressed in the Alzheimer's and Dementia section at the end of this document. However, most of the items discussed in this document apply to all residents, regardless of cognitive or physical impairment.

This checklist is intended as a guide. There is no facility that could possibly offer all the options contained in this checklist. Moreover, all of the items in this list are not appropriate for all people. Prioritize your needs, compare facilities, and this checklist will help you make the decision that best suits your needs or the needs of a loved one.

This document was designed based on my personal experience selecting an Assisted Living facility for my mother and helping her adjust to the Assisted Living lifestyle. During her five years in the ALF, the facility went through numerous personnel and management changes including a change of ownership. This resulted in different operating philosophies, price changes, and, most importantly, varying levels in the quality of her care. With this checklist I have attempted to provide an extensive list of considerations that will help prepare you for not only the initial selection process, but for some of the future changes that may occur.

I trust this checklist will serve you well.

Marjorie J. O'Donnell

## MY STORY

Assisted Living residents make up a diverse population. They range from those who are nearly self-sufficient and independent with active social lives to those who need assistance with even minimal daily tasks. In my case, my widowed mother had been diagnosed with Alzheimer's disease two years earlier and was no longer safe at home. She needed a "special care", or Alzheimer's/Dementia secured unit.

I had no prior experience with elder care and very little information when I began my search for a home for my mother. I was determined to find a very special place for a very special lady. Over the course of a month, I visited fifteen facilities, rejected some immediately, revisited others, and became overwhelmed trying to sort out all the information. Trying to remember all the differences in policies, amenities, and services made it very difficult to compare facilities. This checklist will help minimize those difficulties for you.

Eventually, I narrowed my list to three facilities and asked other family members to make visits and offer their opinions. This process eliminated one facility. My final choice was based on three key considerations I thought were very important; location, the activity program, and the staff. My mother moved into her new home and began to adjust to her new surroundings.

Things were going well until a medical emergency occurred a few months after her move and she was rushed to the emergency room by ambulance. No medical information was sent to the hospital by the facility despite all the initial promises that a packet of emergency medical information would accompany her in an emergency situation. Emergency care was delayed in a very serious situation until I could be located by phone to provide critical information. I addressed this discrepancy with facility management in two meetings and through two letters with no satisfaction. Finally, I filed a complaint of unsafe medical practices with the Office of Elder Affairs. An investigation was conducted, and the finding was in my favor. The facility was required to provide medical information in the event of an emergency for all residents. Shortly thereafter, the management team at this facility was replaced.

For two and a half years everything was fine and then, due to personnel promotions, management changed again. Under new leadership, the focus of the facility changed from providing the best possible quality of life to being solely profit based. Long time employees resigned, staffing was cut to a bare bones level, and the quality of care decreased significantly. I expressed my concern to management. The response was to assure me that these problems were transitional and would be worked out for the benefit of all. It took many meetings over a year long period before there were positive signs of a return to high quality care.

The facility was then sold to a group of investors and there was an even stronger focus on making a profit at the expense of providing quality care. Once again, more employees resigned, staffing was cut further, and the quality of care

decreased. I initiated dialog with families of other residents and jointly formed a Family Council. This was met with resistance by the new owners; however, we were determined to settle for nothing less than the high level of care we had become accustomed to – and were paying for. Small changes started to occur just before my Mother's condition deteriorated and she passed away.

Overall, I was content with my choice of facility in spite of all the management difficulties. My mother's apartment suited her needs, allowed her to keep her cherished personal belongings, and gave her privacy when she wanted it. Most of the staff was exceptional and her care generally was excellent. There was a photo album in a common room on her floor ... it contained pictures of my smiling mother at cookouts, on field trips, in the garden, dining out, at musical programs, craft classes, visiting with children, and engaging in the many activities that occurred each day. She liked the staff and although she couldn't remember their names, she knew their faces and smiled when she saw them. Additionally, I had peace of mind knowing she was safe, well cared for, engaged in pleasant activities on a daily basis, and her quality of life was the best I could provide for her.

# HOW TO BEST USE THIS CHECKLIST

This checklist is designed for use as an assessment tool for selecting an Assisted Living Facility for yourself or for a loved one. The evaluation process contained on the following pages is quite thorough and will result in a careful, thoughtful analysis. Your investment in time for conducting this analysis will reap high rewards. All too often during the evaluation process it becomes easy to confuse what you have seen in each of the facilities you have visited. This checklist will help to minimize that confusion. A comprehensive assessment process, such as this one, will help keep you focused on the mission of finding the most appropriate facility to suit the needs of your loved one's unique living style.

It is envisioned this checklist can be used in one of three ways:

1. You could utilize this tool to personally conduct an assessment of three (3) different Assisted Living Facilities.
2. You could assign several different relatives to conduct evaluations and use this document to compare the differences.
3. You could utilize an unbiased third party to conduct this assessment. Identify the characteristics that are important to you or your family member and let the unbiased third party do the rest. Then visit the facility yourself to make certain you feel comfortable with the analysis.

While many of the topics described herein may be considered important for many people, all of them may not apply to you or your family member. Some, obviously, will be more important than others depending upon your likes and dislikes, your interests, and your personal lifestyle. However, all of these topics merit your consideration as you begin to search for the best Assisted Living Facility. Included in **Section XIII**, is a table with 20 blank spaces for you to add items that you consider to be of primary importance in your selection process.

The "Keys" for conducting the self-assessment is as follows:

- Y** = Yes, this service or amenity exists at a satisfactory level.
- N** = No, this does not exist at a satisfactory level or is not offered at all.
- NI** = This topic is Not Important to either my family or me at this time.

## Comments, Critique, or Recommendations:

Please direct any comments, critiques, or recommendations to Jim O'Donnell of Jaguar Management Consulting Group, Inc. at the address on the inside cover page or by e-mail. Your comments and suggestions are most welcome, will be carefully reviewed, and may be included in the next published edition. Your critique will help improve this checklist for the benefit of others.

The author, publisher, or sponsors of this self-assessment workbook are not engaged in rendering, by either the sale or distribution of this publication, legal, consulting, accounting, or other professional services. Users of this workbook assume full responsibility for all decisions made as a result of this self-assessment process. The reader is encouraged to employ the services of a competent professional in all such matters.

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# TABLE of CONTENTS

**Introduction**

**My Story**

**Words of Wisdom (*Learned the hard way*)**

**How to Best Use This Checklist**

**Checklist Chapters**

- I. Location of the Facility.**  
20 Considerations
- II. Facility Exterior.**  
30 Considerations
- III. Building Interior.**
  - A. Lobby, Hallways and Common Areas.**  
52 Considerations
  - B. Dining Room.**  
16 Considerations
  - C. Resident Rooms, Units, or Apartments.**  
23 Considerations
  - D. Bathrooms.**  
13 Considerations
  - E. Activity Rooms.**  
12 Considerations
- IV. Safety and Emergencies**  
30 Considerations
- V. Staff.**  
43 Considerations
- VI. Wellness.**  
42 Considerations
- VII. Activities.**  
63 Considerations
- VIII. Food Services.**  
22 Considerations
- IX. Housekeeping.**  
10 Considerations
- X. Services Offered.**  
19 Considerations
- XI. Resident Agreement, Contracts and Policies.**  
118 Considerations
- XII. Helpful Hints and Questions to Ask.**  
50 Considerations
- XIII. Considerations Important to You.**  
20 Considerations



## **Table of Contents Continued . . .**

### **ALZHEIMER'S/DEMENTIA SECTION**

#### **Intro – Alzheimer's/Dementia Section.**

- XIV. Alzheimer's/Dementia Unit.**  
48 Considerations
- XV. Taking Care of Your Most Valuable Asset – Yourself.**  
25 Considerations
- XVI. Important Family Documents.**  
32 Items
- XVII. Sample – Medical Emergency Information Packet.**
- XVIII. Helpful Resources.**
- XIX. Author Bio – Marjorie J. O'Donnell.**
- XX. Bio – Jim O'Donnell.**
- XXI. Other Checklists Currently Available.**





















## XII. Helpful hints and questions to ask Continued ...

### No. Items to be considered:

- 18. Ask this question of many people "What is the best thing and the worst thing about this facility"
- 20.
- 22. Speak with the Activities Director to ask activities questions
- 27. Most importantly, carefully observe the interaction of the staff with the residents
- 28. Do the residents back away from or appear fearful of some staff members? Take that reaction seriously!
- 36. Do residents appear to be enjoying life?
- 44.
- 45.
- 46.
- 47.
- N.** Do staff members interact with visitors or family members
- 49.**
- 50.** Will the ALF provide financial info to demonstrate it is financially sound

Facility #1			Facility #2			Facility #3		
Y	N	NI	Y	N	NI	Y	N	NI
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### Food for Thought ...

Many ALF Agreements and Contracts are difficult to understand because they are full of industry jargon and legal terms, Additionally, the ALF will generally state that the contract is "standard" and non-negotiable. It could prove beneficial to have an attorney review it on your behalf. An attorney will help you understand what is and isn't negotiable, what the jargon and terminology really means, and clarify your rights. Additionally, any unique situation you may have that is not listed in the contract provides an opportunity for negotiation. See **Section XI.** to gain a better understanding of the elements of a resident's agreement.

## **VIII. SAMPLE - MEDICAL EMERGENCY INFORMATION PACKET. *(Partial)***

Medical Emergency Information Packet:

This packet of information should be maintained and updated either by the resident or a family member. It should accompany the resident to the hospital emergency room in case of a medical emergency. Three copies should be given to the Assisted Living facility; one for the nurse's files, one for the emergency file, and one in the resident's locked medication cabinet. Three copies are given to ensure that time is not wasted during an emergency while a copy is being made, or an office key is located. Additionally, family members should have copies in the event they are contacted by the emergency room staff for more information. In many emergency situations residents are unable to speak for themselves and need a family member to provide accurate, updated medical information. A sample of a medical emergency information packet is shown on the following pages.

## **XIX. Author Bio: Marjorie O'Donnell**

Margie O'Donnell is Vice President of Jaguar Management Consulting Group, Inc. Ms. O'Donnell represents the softer side of Jaguar Management Consulting Inc. and focuses her efforts on the people centered part of the business. She has worked as an advocate for families, the elderly, children, the economically disadvantaged, the disabled, individuals and families facing medical crisis and those struggling with life transitions.

Ms. O'Donnell has authored an extensive workbook entitled **Checklist for Selecting an Assisted Living Facility for Yourself or a Loved One** and an e-book entitled **An Assisted Living Facility eBook; To help with Choosing an Assisted Living Facility**. Personal experience was the motivator for creating the Checklist and the e-book in order to assist others who find themselves in a similar situation.

Additionally, she concentrates her efforts on the esthetic side of client's businesses, helping to create a warm welcoming atmosphere for customers in Retail Stores and Restaurants. She also assists with functionality, efficiency, delivery of services and customer service tactics to increase customer base and create company loyalty in existing customers. She provides business owners with the customer's point of view and offers unique and individual marketing strategies.

Life experience includes:

- Fifty+ year marriage
- Mother of four (4) grown children
- Grandmother of eight (8)
- Kindergarten teacher
- Teaching assistant for Learning Disabled children
- Substitute teacher in a public elementary school
- Founder and leader of a Girl Scout Troop for Special Needs girls
- Cub Scout Leader
- Children's Librarian
- Adult Services Librarian
- NH State Certified Alcohol and Substance Abuse Educator
- Instructor of 20-hour NH State court mandated Impaired Driver Alcohol and Drug Abuse Education Program
- Volunteer speaker for the Impaired Driver multiple offender program
- Volunteer speaker at high schools about the dangers of drinking and driving
- Volunteer "Reader" to pre-school children at several libraries and day care centers
- Japanese storyteller at libraries and elementary schools
- FastTrac business planning program graduate
- Silva Mind Method International graduate
- Graduate of Northern Essex Community College
- Primary caregiver for mother with Alzheimer's disease for five years
- Influenced changing Massachusetts State Law regarding Assisted Living facilities handling of medical emergencies.
- Authored an article entitled **Selecting an Assisted Living Facility** published in Business NH Magazine, September 2004
- Authored an eBook entitled **An Assisted Living Facility eBook: Help with Choosing an Assisted Living Facility for Yourself or a Loved One** with the first edition published January 2010
- Mother of two sons who suffered severe brain injuries and have made excellent recoveries
- Influenced the staff to make changes to everyday procedures in a hospital Brain Injury Unit
- 2X Cancer survivor
- Mother of a son who is a cancer survivor

## **XX. James S. O'Donnell - - Bio:**

Mr. O'Donnell is a Founding Partner of **Crevand, Inc.** a specialty Online/Internet Marketing Strategy company formed with his son, Dan, in 2008. Crevand's creative strategies uniquely enable businesses of all sizes to leverage their online assets to out-market their competition and effectively manage their marketing campaigns for raising brand awareness, both online and offline. Crevand, Inc. is a trusted SEO agency with an expertise in Search Engine Optimization (SEO) and Search Engine Marketing (SEM) that offers its clients a customized range of proven marketing services that deliver results. With over fifteen years of experience optimizing and ranking web sites for increased search engine presence, online branding, traffic generation, and top rankings, we provide clients with targeted search engine traffic and cost-effective SEO campaigns with a high ROI. Research and data are the backbone of every SEO campaign. In a continually changing search market, testing, data, and knowledge are what drives our client success. As an innovative online marketing agency that emphasizes creative marketing campaigns through SEO/SEM solutions, targeted content marketing, and data driven research, Crevand, Inc. will create a high visibility online presence for your business that will generate quality traffic resulting in increased business revenue. Crevand has two offices, one in Wolfeboro, NH and the other in Boise, ID.

Mr. O'Donnell also founded **Jaguar Management Consulting Group, Inc.** in Kingston, NH in 1995 to counsel business owners and senior management teams struggling with growth and cash flow constraints. He provides practical, cost-effective, traditional marketing and online marketing strategies, business development and growth strategies, financial management controls, and turnaround management methodologies to revitalize and reposition the business for profitability. Although he still consults, his primary endeavors are now focused on Crevand, Inc. In his consulting capacity, Mr. O'Donnell has counseled hundreds of businesses to effectively manage their bottom line, increase revenues, and implement cost control strategies.

**Prior Responsibilities and Experience:** Mr. O'Donnell has served both the Public and Private sectors and has consulted with companies of all sizes. He has completed a CFO/COO project to turnaround a telecom company where this company was restored to profitability as well as implementing a series of highly successfully Search Engine Marketing Strategies. Previously, he managed an eight-year, part-time consulting contract with the City of Portsmouth, NH Economic Development Dept. with services that included developing and implementing marketing strategies, business development processes, business planning, conducting productivity studies, financing strategies, and conducting business seminars for over 375 businesses. Concurrently, he also fulfilled a three-year, part-time consulting contract with the City of Somersworth, NH Economic Development Dept. providing similar services to over 50 small businesses. Additionally, he proposed and managed a long-term, part-time contract with the New Hampshire State Port Authority counseling fisherman leaving the fishing industry to start new ventures.

Mr. O'Donnell was President of a publicly traded computer company that marketed software products and services for managing municipalities. This was a turnaround situation where the company was restored to a break-even position. Additionally, he held a number of senior management positions chartered with the mission of starting new international Consulting Services, Professional Services, and Customer Services divisions where he had complete P&L responsibility for revenue generation, business

development, marketing and sales strategy, productizing intangible services, financial management, and building successful, responsive, and profitable organizations at Prime Computer, Symbolics, Inc., and Applicon, Inc.

Jaguar Consulting has developed a number of **Self-Assessment Marketing and Management Guides and Checklists** whereby businesses can conduct internal assessments for identifying both growth opportunities and areas of inefficiency. These products include a One Month Business Tune-up Checklist, Retail Store Self-Assessment Checklist, Restaurant Self-Assessment Checklist, Business Start-up Checklist, Employee Benefits Checklist, and a Checklist for Selecting an Assisted Living Facility for Yourself or a Loved One.

Mr. O'Donnell has taught several seminars and workshops that include Starting a Small Business, Business Planning, Managing Through a Difficult Economy, Google is Your Friend, and various Internet Marketing Strategy topics.

**Education:** Mr. O'Donnell holds an MBA from Babson College, a Bachelor of Business Management from Merrimack College where he graduated with the highest Grade Point Average in the Business Administration Program, and an Associate of Mechanical Engineering from Franklin Institute of Boston.

**Community:** He has served as a Board Member for the Kingston Children's Center for three years, Atlantic TurnKey Corporation for two years, New Hampshire State Port Authority's Fisherman's Revolving Loan Fund for three years and the Society of Professional Consultants for four years as well as Management Advisory Committees for several small businesses, the Advisory Board for the University of New Hampshire's CEO Forum, a member of US Senator John E. Sununu's Small Business Advisory Group, the Portsmouth Chamber of Commerce's Business Development and Technology Roundtable Committees, three years as a judge to annually select the Top Ten Best Company's in NH, and four years the New Hampshire State Director for the nationally known FastTrac™ Business Planning and Business Start-Up programs. He also received an "Excellence in Business Counseling" award at the NH Economic Development Conference in December 2000. In May 2017, Mr. O'Donnell was appointed to the Town of Wolfeboro's Economic Development Committee as an Alternate Member for two years.

**Personal:** Mr. O'Donnell enjoys spending time with his four adult children and his grandchildren. Leisure time activities include traveling, hiking, walking on the beach with his wife, snowshoeing, kayaking, classical music and reading. Recently he has taken up swimming and participated in the swim leg of the NH Granite Man triathlon the past three years. One of his goals is to have a part-time business with each one of his children and grandchildren for both fun and profit.

## **XXI. Other Business Checklists - - Descriptions**

**Retail Store Management and Marketing Checklist:** Retail storeowners and managers can now conduct a thorough "Self-Assessment" of where their operations stand today, and then, based upon the results of this analysis, implement sound business strategies for accelerating growth, reducing unnecessary waste, and improving their store's profitability. This unique management tool features over 1,000 tactics, strategies, and action items for evaluating twenty-five different operational categories ranging from store image to customer service to marketing. The Checklist includes a simple process for helping you identify the highest priority tasks along with assigning responsibilities and due dates for completing each action item. This process is your personal management tool for tracking progress. Bring your retail store to the next level of growth and profitability by using this management Checklist today. To see how your store can benefit from this Checklist, visit [Retail Store Management and Marketing Checklist](#)

**Restaurant Management and Marketing Checklist:** Restaurant owners and managers can now conduct a thorough "Self-Assessment" of where their operations stand today, and then, based upon the results of this analysis, implement sound business strategies for accelerating growth, reducing unnecessary waste, and improving their restaurant's profitability. This unique management tool features over 1,425 tactics, strategies, and action items for evaluating thirty-two different operational categories ranging from restaurant image to customer service to marketing. The Checklist includes a simple process to help you identify the highest priority tasks along with assigning responsibilities and due dates for completing each action item. This process is your personal management tool for tracking progress. Bring your restaurant to the next level of growth and profitability by using this management Checklist today. To see how your restaurant can benefit from this Checklist, visit [Restaurant Management and Marketing Checklist](#)

**Employee Benefits (Employee Motivation) Checklist:** Motivating employees and keeping them motivated is one of the most difficult, and most rewarding, activities of a senior manager. Even in the most difficult of economic times, we know employees have choices regarding the company, and the culture, in which they prefer to work. This checklist is designed to be a self-assessment management tool for conducting an evaluation of your company's employee benefits and motivational strategies. Offering over 500 ideas, this guide is designed for the serious management team that truly wants to evolve their business to the next level of growth and profitability via the strategy of employee satisfaction. To see some ideas for what your company could do to improve employee satisfaction, visit [Employee Benefits \(Employee Motivation\) Checklist](#)

**Business Anniversary and Celebrations Checklist:** This checklist has over 400 ideas to help your business enjoy its important milestones and celebrate its employees and customers. This Checklist features many interesting marketing and fun activities for restaurants, retail stores, child themed stores and numerous ideas for all types of businesses. This is a great way to build employee morale and connect with your customers - - show them how much you appreciate them. Have fun at your celebration with some of the ideas featured in the [Business Anniversary and Celebrations Checklist](#)

**Personal Readiness To Start A Business Checklist:** Am I prepared to be a business owner is the most important question that must be asked? With over 300 insightful questions and action steps, this checklist will help you answer that question. The Checklist



is a self-assessment tool that is designed to help you prepare for starting a business. Its primary focus is on determining if you are truly ready to start a business by examining a range of topics that include family considerations, financial resources, personal and professional support systems as well as many other vital subjects. Each module has a simple process that allows you to take an inventory of all the factors and actions necessary for success. This can be done quickly and easily and will rapidly identify areas that will require you to seek additional information or to conduct more research. Beside each question or action item is a space for making notes that will help facilitate the evaluation process and serve as a reminder to follow up on certain items. This is a simple personal management process to help keep you focused. The checklist is based on the author's experience with hundreds of small businesses. To get started now, visit [Personal Readiness To Start A Business Checklist](#)

If, after taking this assessment you believe you are truly ready to start a business, then consider the **Start a Business Checklist – Implementation** described below.

**Start A Business Checklist - Implementation:** Am I prepared to be a business owner is the most important question that must be asked? The "Implementation" Start A Business Checklist is much more extensive than the "Personal Readiness" Checklist. This Checklist will help you minimize mistakes and prepare you for a successful launch of your business. The same 300+ questions and action items are asked but included is a comprehensive format and process to help you manage priorities, due dates, and the resources required to launch your business. Additionally, there are Summary Charts and Tables showing the various Business Entity Types, a discussion of The 13 Worst Business Start-Up Mistakes, and a chart for Viable Alternatives to Starting a New Business. Also included is the complete Business Planning Guide (described below) that will guide you through the process of writing your business plan. If you purchase this Checklist, then **DO NOT** buy the *"How To Write A Business Plan Guide"* as it is included. The Start A Business Checklist is based on the author's experience with hundreds of small businesses. If you are serious about launching your business, this is the checklist for you. To get started now, visit [Start A Business Checklist - Implementation](#)

The **How To Write A Business Plan Guide** is designed to provide a process for creating several variations of a business plan with each variation used for a specific purpose and for a specific audience. This guide features a One Page Executive Summary Format, a Simplified Model for a Business Plan, guidance for Creating a Comprehensive Business Plan, instructions for How to Use the Business Plan Guide, a discussion of The Business Plan creation Process, helpful Tips for Writing the Business Plan, a sample Business Plan Outline, a Business Plan Outline Description, 2 sample Cash Flow Statements that are downloadable for your business plan, 22 Market Research Sources, and 27 possible Funding Options. A comprehensive business plan that is well-written, based upon market research, and is supported by a conservative and thoughtful Cash Flow Statement will provide a structure for helping to make your business successful. This guide is based on the author's experience with hundreds of small businesses. To get started with writing your business plan, visit the [How To Write A Business Plan Guide](#)

**Business Plan Review:** Would you benefit from having an experienced businessperson review your business plan before you present the plan to potential investors or bank loan officers? Once your business plan has been written, I will spend up to two hours reviewing your business plan or loan proposal for completeness, viability, and to see if it "makes good business sense". In other words, let's catch any mistakes now! This review does not include rewriting any part of the plan, conducting market research, modifying

the Cash Flow Statement, or commenting on any legalities, but I will review the assumptions, the numbers, the marketing plan, and the overall presentation as well as provide feedback on my general impressions. I'll give constructive feedback with some brief written comments, ask some questions of clarification, and provide helpful suggestions for improving your Business Plan. Take advantage of this value-priced service by visiting [Business Plan Review](#)

**Business Documents Review:** Would your business benefit from having an experienced businessperson review your strategic plan, marketing plan, Search Engine Optimization strategy, Search Engine Marketing plan, business plan, expansion and growth strategy, Cash Flow Statement, or any other business initiative? Do your plans need validation or tweaking?, Do you need help identifying areas of improvement or selecting a better option? Are you currently getting the results you want? If not, perhaps having an experienced set of eyes "take a closer look" will provide a new perspective. Our Business Documents Review Services are tailored to fit your needs and budget. For more info visit [Business Documents Review](#)

**Custom Checklists and Guides:** If you like the content, organization, and format of my checklists, then I can customize an existing checklist (or create a completely new Checklist) for your business or industry. For more info visit [Business Documents Review](#)

**Checklist for Choosing an Assisted Living Facility for Yourself or a Loved One:** This Checklist features over 650 items to be considered when making this critical family decision. If you have a family member, friend, relative, neighbor, or business associate considering an Assisted Living Facility lifestyle, or a senior living home, for themselves or a family member, this checklist will make the decision-making process much easier. This checklist is based on our family's personal experience with selecting an ALF for my Mother-in-law, handling several of her medical emergencies at the ALF, and working through several ALF organizational changes. Select the "right" Assisted living Facility for your loved one by visiting [Checklist for Selecting an Assisted Living Facility](#)