

What to Expect When Researching Life Plan Communities

Learn How to Prepare for a Move to a Life Plan Community, From Research to Downsizing



PRESBYTERIAN
SENIOR LIVING

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Introduction

In today's digital age, most people begin the search for retirement living by turning to online sources. And the internet is a great way to learn more about the different types of housing solutions available and the pros and cons of each. While word of mouth from family, friends, and trusted advisors is still important, it often comes into play further along in the process, after people have had a chance to explore their options.



Many senior living organizations have resource-rich websites that allow older adults to self-educate at their own pace. You can gather information on topics ranging from financing options to how communities are licensed.

If you are like many seniors, your research may lead you to a type of retirement housing known as a life plan community. It's a unique senior living option that can satisfy a new retiree's desire for an active and independent lifestyle now, while also being able to accommodate future changes and the need for more assistance.

Inside this Guide

As you create a plan for retirement living, we encourage you to take advantage of resources and tools created by organizations like PSL. Our ultimate goal in designing and sharing our online [Learning Center](#) is to give you the information and support necessary to make an informed decision.

In this guide, you will find tips on researching online, calling communities for the first time, working with a community representative, visiting potential life plan communities in person, and narrowing down your decision. And we even include a few pointers on downsizing and where to turn to for help with that task.

Conducting Online Research

The volume and variety of resources available online can make the search for a life plan community both easier and overwhelming. These tips can help you better focus your efforts:



- **Explore options in your targeted cities:** Unless you'd like to stay within a very specific area, start by including different cities in your search terms. For example, if you've always lived in a rural community but enjoyed vacationing in bigger cities, add those to your search. You might find it appealing to consider a community right in the midst of a city like Philadelphia or within driving distance of the waterfront in Baltimore or Annapolis. By starting big, you give yourself an opportunity to fully explore your options. As your search continues, you can narrow your focus.
- **Visit each community's website and social media:** One early avenue for getting to know a community is spending some time on their website and social media channels. You'll be able to identify what levels of care the community offers, view floorplans, and flip through photos posted to Facebook. Some communities offer basic pricing information, as well.
- **Utilize online learning center resources to self-educate:** Another way to learn more about a community is to read their blog articles, guides, and other tools. Industry leaders often incorporate these thoughtfully designed digital resources into their websites to make it easier for people to better understand their options and which might be the best fit.
- **Watch virtual tours (but still plan personal visits):** Many communities include virtual tours on their websites, too. They can be a great introduction to a community. But we encourage you not to skip making in-person visits to any community you are seriously considering. It's really the best way to make an informed decision.

Making Preliminary Phone Calls

Once you've spent time online, you'll likely find it helpful to start making initial phone calls to each community under serious consideration. It can help you narrow down your choices and figure out which you'd like to tour. Here's what to keep in mind as you make calls:

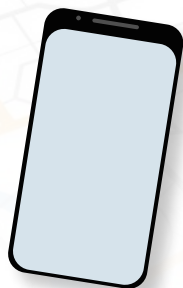


- **Prepare a list of questions to ask:**

Before you start calling, create a must-ask list of questions, plus any community-specific ones you have after doing your preliminary research.

- **Take good notes during every call:** It's tempting to think you will remember how the community representative answers each of your questions. But once you call more than a location or two, recalling who said what might be tough. That's why it's important to document responses so you can review everything before taking next steps.

- **Determine where to schedule visits:** After you've spent some time online and making phone calls to the communities that seem like the best fit, sit down and review your notes. Eliminate the communities that are obviously not a good option for whatever reason. Then come up with a list of those you'd like to visit in person.



Working with a Community Representative

The team at a life plan community typically includes a few people who are designated to work closely with seniors and their families throughout the process. These community representatives have experience assisting seniors with everything from exploring potential funding sources to connecting with local professionals who can make the move go more smoothly.



Here's a quick overview of the community representative's role:

- Provide visitors with a community introduction/overview
- Conduct tours and answer any questions
- Explain the community's pricing structure
- Discuss potential funding sources
- Connect potential new residents with resources



Visiting Communities in Person

While virtual tours and photos on an organization's website provide a good introduction, nothing can replace visiting a community in person. The in-person visit is truly the best way to get a good feel for the community. Give yourself plenty of time to spend at every community you're seriously considering. And whenever possible, it's best to schedule several trips to each location on your list.



Here are a few tips for getting to know a community:

- Prepare the questions you want to ask and jot down a few reminders of what to look for on your visit. If you aren't sure what to include, this checklist of [questions to ask when touring](#) might be helpful.
- Ask to meet current residents and their family members. Most communities will be happy to arrange these types of meetings, and it will give you an opportunity to hear from insiders firsthand.
- Attend community events/activities before making a decision. It's another great way to meet people and see what a day in the life of a resident is really like. Ask the community representative for a copy of the activity calendar, and identify those you'd like to participate in.

Don't forget that this is your time to take advantage of the expertise of team members responsible for personal visits. Ask them all the questions you have about the specific location and life plan communities in general.

Narrowing Down the Choices

For many people, this can be the toughest part of the search. Making an informed decision means paying thoughtful attention to factors ranging from costs to the community's reputation for quality care and services. As you are narrowing down your options, keep these in mind:



- Assess whether the community fits your budgetary constraints. Is it financially feasible now and into the future?
- Consider whether the community can meet your current and future needs. While you might be active and independent now, what happens if you have a change in health that necessitates more assistance?
- Search for word-of-mouth insight. Ask around to see if any friends, family, or other people you know have connections to the communities you are contemplating. Insights from those you trust can be very helpful.
- Read online review websites. Though these reviews shouldn't be at the top of your decision-making factors, don't overlook them. The opinions of residents and family members—or former residents and family members—might be useful in narrowing down your choices.



Getting Involved in Resident Life

Once you've made what feels like the best decision for your personal needs and interests, the next step is to set a goal to get involved at the community. Don't wait until after the move. When you start engaging with your future neighbors prior to moving day, you'll likely find your anxiety and fears about making such a big change begin to subside.



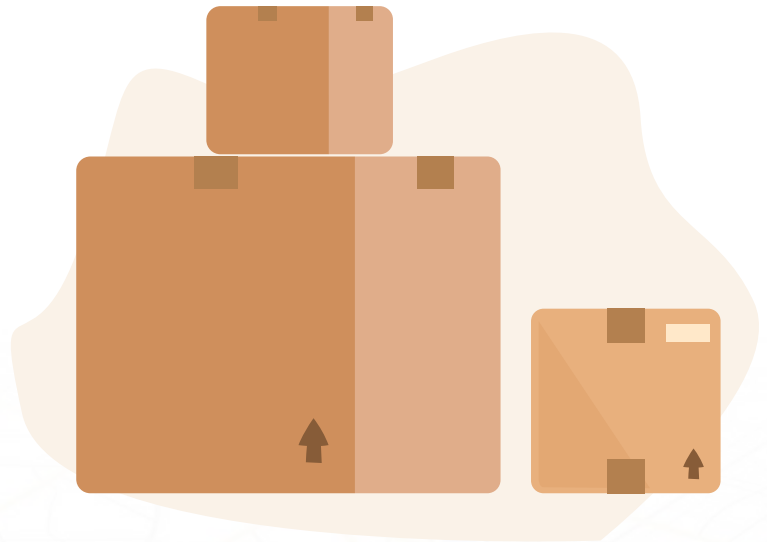
If you live close enough to the community you plan to move to, ask the community representative you are working with for suggestions on how to join them on a regular basis. In particular, inquire about how to:

- Start participating in activities before moving, whether it's once or twice a month or every week. You'll likely find a variety of programs and clubs that will welcome you.
- Ask for introductions to peers and team members. Maybe start by sharing your hobbies with the life enrichment team's community representative and asking if they know which residents enjoy similar interests. Having some friendly faces to greet you on moving day and in the first few weeks afterward can help to calm moving jitters.



Starting to Downsize

While a transition like this can be daunting, especially if you are downsizing from a large house, don't let it hold you back from starting this new chapter in life. By tackling this process in a systematic, thoughtful manner, you can make it feel less overwhelming.



A few suggestions for getting started include:

- **Begin in the least-used rooms:** It can be a little less intimidating to start in the rooms you don't use very often. These are places where you might have accumulated belongings that won't be making the move with you. Work your way up to the rooms and items you use more frequently.
- **Sort belongings by final destination:** Another practical tip is to set up boxes to sort things by their final destination. For example, have a box that will go to charity, one for adult children, another for items you think will make the move with you, a box for estate sale items, and so on. Try not to set too many belongings aside to "decide on later." Procrastinating likely won't make the decision any easier.
- **Utilize downsizing guides/tools:** There are a variety of guides and checklists online designed to walk seniors and their families through this process. For example, if you search for downsizing in the [PSL Waypoints Learning Center](#), you'll find guides, blog articles, and a checklist you can read or download.
- **Enlist personal or professional help:** If the logistics of downsizing and selling a home feel too overwhelming, one final suggestion is to enlist the services of a senior move manager. These professionals can assist with every detail, from packing to overseeing an estate sale and hiring a moving company. Talk with the community representative you are working with for help connecting with these types of professional resources.

Conclusion

We hope this information has been useful in walking you through what to expect when it's time to begin researching for a move to a life plan community. Another helpful guide created by the experts at PSL is [Preparing for Retirement Living: How to Navigate Finances and Downsize to the Right Size Home](#). It will help you through topics ranging from safety and budget to comparing the costs associated with each type of senior care option. We invite you to download it, with our compliments.

[View Our Community List](#)



Schedule a Visit to a PSL Community

The best way to learn more about the services, amenities, programs, and mission of a senior living community is by visiting in person. We invite you to call the PSL community nearest you to schedule a visit today!



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