



HOUSING LIVABILITY ASSESSMENT TOOL FOR PROFESSIONALS

A comprehensive checklist for scoring older adult housing on physical and mental wellness, safety and security, facility design, and management practices to support independence to age-in-place.

Housing Property

Number of Units

Number of Residents

Date



INTRODUCTION

Overview

Safe and Healthy Communities (SHC) developed the Housing Livability Assessment Tool for Professionals (referred to as H-LAT Pro). SHC is a non-profit organization dedicated to creating and ensuring safe, healthy, sustainable, and equitable communities for all. The tool was funded by the Next50 Initiative, a foundation that promotes independence and dignity for the aging population.

The purpose of this tool is to assess and score the health and safety of existing housing properties and provide design, policy, and programming guidance to help older adults age in place.

Older adults (age 60+) can stay healthy, safe, and independent in their homes as they age, delaying or avoiding the need to relocate to an assisted living or nursing care facility. This tool supports all residents who may need to utilize a walker, wheelchair, or need vision or auditory/communication assistance, focusing on improving lighting, flooring, ADA accessibility, and visual cues that can promote safety and security.

The H-LAT Pro is designed to be user-friendly, intended for use by housing professionals, operators, and managers of housing facilities, developers, and residents. The tool is a checklist, divided into three phases constituting six main sections that focus on various aspects of housing: outdoor spaces; fitness and wellness; social engagement and education opportunities; common areas and entrances; inside apartment; and management and operations of housing property. Instructions on how to use the tool are provided in the following sections. For brevity and specificity, H-LAT Pro focuses on the housing property and does not include an assessment of nearby community amenities.

Relevance

The demographics of the U.S. are shifting, necessitating the development of housing that adequately accommodates the aging population. According to 2030 U.S. population projections, Americans age 65+ will outnumber children for the first time in history, accounting for 20 percent of the population.¹ Older adults are a vulnerable population due to the physical and cognitive changes associated with aging. Each year, a quarter of Americans ages 65+ fall, with one in five falls (22%) causing serious injury that threatens their independence.^{2,3} The cost of falls in older adults is not only their health and independence, but also the significant medical expenses to society that total nearly \$51 billion per year.⁴ Thus, living environments are integral to maintaining the health, safety, quality of life, and independence of older adults. To support aging adults, there is a need for universally designed homes, social engagement, enriching environments, physical activity, and an overall sense of safety to age successfully and thrive.⁴ Research indicates environments specifically designed to support older adults can be the difference between rapid age-related decline, and a longer, healthier life. Older adults who remain active and engaged are more likely to enjoy independence, experience enhanced physical and mental well-being, and have a greater quality of life.⁵

¹U.S. Census Bureau (2017). Retrieved from <https://www.census.gov/newsroom/press-releases/2018/cb18-41-population-projections.html>

²Centers for Disease Control (2018). <https://www.cdc.gov/homeandrecreationalafety/falls/data/falls-by-state.html>

³University of Rochester Medical Center (2010). <https://www.urmc.rochester.edu/news/story/for-elderly-even-short-falls-can-be-deadly>

⁴Centers for Disease Control (2018). <https://www.cdc.gov/homeandrecreationalafety/falls/data/falls-by-state.html>

⁵Health Impact Project (2015). <https://www.pewtrusts.org/~media/assets/2015/06/connecting-public-housing-and-health.pdf?la=en>



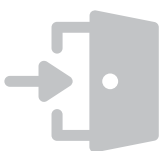
Indicators

The tool's indicators (design features, policies and programs) were developed from more than 20 academic and professional resources including the Americans with Disabilities Act (ADA) requirements, AARP Home Fit Guide, U.S. Department of Housing and Urban Development (HUD) policies, Universal Design principles, Aging in Place Enterprise Green Communities Tool, AARP 8 Domains of Livability, and numerous published research articles related to healthy and safe housing design for older adults. Not all ADA requirements are included in this tool because some standards were too detailed to be effectively incorporated without sacrificing ease-of-use. Each indicator includes a hyperlink to the data source if greater detail is needed.

Several of the indicators were also developed after SHC conducted more than 70 interviews of residents and a few housing authority staff, visited facilities, and pilot tested the tool in housing authority properties in the U.S. The below icons are marked with indicators throughout the document with the different indicators they pertain to. Icons are included for 1) data collected from interviews, 2) meeting the requirements for visitability, and 3) have design elements to increase energy efficiency. Phase 2, Throughout Housing Facility and Within Apartments, is especially useful for housing developers.



Key Informant Interviews: Developed based on feedback from mostly residents or housing property staff



Visitability: Measures that make it easier for people with disabilities to visit the housing property



Energy Efficiency: Can aid in the reduction of energy use and its associated costs at the housing property

Short Glossary

[Aging in Place](#)

Ability to live in one's own home and community safely, independently, and comfortably, regardless of age, income, or ability level.

[Health](#)

A state of physical, mental, and social well-being and not merely the absence of disease and infirmity.

[Universal Design](#)

Design of products and environments are usable by all people, to the greatest extent possible, without the need for adaptation or specialized design.

[ADA Compliant](#)

Standards that promote accessible environments for people with disabilities, outlining the physical requirements of a building (including ramps, accessible doors, signage for persons who are blind or experience low vision, etc.). In September 2010, the Department of Justice (DOJ) published updates to the Americans with Disabilities Act (ADA). ADA standards apply to commercial and public entities that have "places of public accommodation." For an entity to be ADA compliant, they need to ensure that public spaces and "electronic and information technology" are accessible to people with disabilities, and often need to provide accommodations to do so.

[Visitability](#)

Design standards for housing that allow for anyone who uses a wheelchair or other mobility device to visit a home. To meet the three standard visitability requirements, a home/housing facility has at least one zero-step entrance, doors with 32 inches of clear passage space, and one bathroom on the main floor you can get into in a wheelchair.

[Energy Efficient](#)

Design interventions aimed at reducing or preserving the amount of energy required to provide products and services, e.g. thicker wall insulation or double-pane windows use less heating and cooling energy. Buying energy-efficient appliances (e.g., ENERGY STAR) is another common intervention used to preserve energy.



**Phase I:
Outdoors,
Wellness & Social
Engagement**

Outdoor Spaces/
Property Grounds

Fitness and Wellness

Social Engagement &
Education
Opportunities

**Phase 2:
Throughout Housing
Facility and Within
Apartments**

Entrances, Exits and
Lobby

Stairways, Elevators,
Hallways, Steps, and
Flooring

Common Areas

Apartment Entrance

Main Living Area and
Throughout
Apartment

Kitchen

Bathroom

Bedroom

**Phase 3:
Management &
Operations**

Residents' Rights and
Input

Management
Responsibilities

Maintenance
Responsibilities

Pest Control

Fire and Emergency
Safety Regulations

INSTRUCTIONS

This tool is segmented into three phases: 1) Outdoor Space, Fitness & Wellness, Social Engagement & Education Opportunities; 2) Throughout Housing Facility and Within Apartments; and 3) Management & Operations During each phase, the assessor/evaluator will go through a checklist of indicators and rate each by scoring yes, no, or not applicable (N/A). At the end of each section, sum and record the score, marking how many points were in each section. At the end of the assessment, tally the total number of points possible for all sections. The following percentage points indicate the final score for the tool:

Bronze	Silver	Gold	Platinum
0-39%	40-59%	60-79%	80-100%

To begin, either print out this document or complete the tool on a computer or tablet. The assessment may differ based on whether it is used at an existing property or future property [see below for specific directions for both].

This tool can be used for both existing and future housing facilities:

For Existing Housing Properties

Begin the assessment by walking through and around the housing property and checking either yes, no/unsure, or not applicable (N/A) for each element/indicator that is listed in each section. Each indicator only gets one check by it. At the end of each section, add up the total for that section.

For Future Housing Properties

Begin the assessment by gathering all relevant data, plans, and resources related to the design and development of the new/future housing property. Then, go through one section at a time to check either yes, no/not sure, or N/A for each element that is listed

Bonus: Some extra indicators are provided at the end of some sections. These indicators are scored in the same way as those mentioned above and adds one point to the total housing property score (+1).

Checklist Rating System

Each section has an indicator listed with three options next to it. The three options that you can mark are below.

Yes: checking yes means that the property **does** have this feature and adds one point to the facilities total score (+1). If this feature exists on the property but could be expanded or improved, still check yes, but add a note in the comments section at the beginning of the section.

No/Unsure: checking no means that the property **does not** have this feature, or if **unsure** the housing property has this feature. No/Unsure does not change the total property score (0).




Not applicable (N/A): checking N/A indicates that this element is **not related or relevant** because that feature is not part of the housing design (for example, not having a tub in the units, which can be safer but there are indicators that address improving safety with tubs); checking an indicator as not being applicable will reduce the overall total possible points, not the total points for the property but the total number of indicators (denominator). N/A ensures that a property is not docked points for certain features (-1). N/A should be sparingly used (not having a common room is not better for residents so N/A would not apply).



Phase 1:

Outdoors, Wellness & Social
Engagement

Section A: OUTDOOR SPACES/PROPERTY GROUNDS

	Yes	No/ Unsure	N/A
General			
Plenty of accessible seating areas available (e.g. benches) considering the total number of residents 			
Tables accommodate wheelchairs, being at least 28 to 34-inch maximum height above floor 			
Chairs are easily movable to create social space or for wheelchair space			
Accessible seating with backs and armrests to aid individuals in standing			
Choice of age-appropriate seating types (e.g. not low to ground)			
Seating contrasts in color to the ground			
Seating available in sun and shade all times of day			
Outdoor environment is well maintained at all times for safety and aesthetic purposes (e.g. free of litter and debris) 			
Drinking fountains are 17 to 19 inches from front edge to wall, clear knee space is at least 27 inches high to be wheelchair accessible			
Deck, patio, or balcony surfaces are level with interior floor level (a maximum of ½-inch off from interior floor level)			
Lighting fixtures focus light where needed (instead of large, flooded overhead lighting), using solar, if possible			
Areas designated for social and cognitive activities (e.g. playing cards)			
Areas designated for recreation and exercise (e.g. bocce ball)			
Outdoor space has clear layout with easily understandable destination points (e.g. single entry loop).			
Shade structures or sail to protect from outdoor elements (e.g. sun, rain)			
If multiple buildings, large signs and clear wayfinding directions			
Seating			
Plenty of seating near the gardening area 			
Forward-facing wheelchair access to garden that is 45 by 48 inches wide and between 24 to 30 inches high 			









Pathways			
Paving is non-skid, non-glare (e.g. colored concrete)			
Handrails along walkways with slope or right angles			
Walkways have color/texture contrast to indicate change in surface levels (e.g. edges of pathway or ramps)			
Walkways are at least 60 inches wide to allow for two wheelchairs to pass			
Paving of walkways are level and easy for mobility devices to move on 			
Pathways are lined with light sources (e.g. shorter bollards or lights embedded in sidewalk)			
Garden/Plants			
Horticultural therapy /gardening area			
Raised garden beds are 32" apart from one another for wheelchair access			
Raised garden beds are a minimum of 36 inches tall and at varying heights from ground, 3 to 4 feet wide			
Abundance of greenery with diverse mix of plants and trees that encourage tactile and sensory engagement, varying heights for opportunities for engagement			
Trees that provide shade (e.g. Oak or Aspen) 			
Abundant flowers with high saturated colors like red, orange and yellow for increased visibility for aging eyes (N/A when not in season)			
Plants are selected for noise abatement , if needed (e.g. broadleaf evergreens such as spruces, pines and hollies, deciduous shrubs, and conifers)			
Low maintenance and low water shrubs and plants (e.g. Silvery Leadplant, Mountain Mahogany)			
70% lush garden to 30% hardscape (man-made structures)			
Plants and accessories to attract wildlife (e.g. birdfeeders)			
No toxic plants present (e.g. chokecherry , poison ivy)			
Kiosk/Signage near garden with gardening instructions			
Garden irrigation system is installed and functional			
Shed for adaptable gardening tools and nearby hose connection (e.g. tools with wide handles and longer reach)			
Garden is visible from indoor seating areas to provide eyes on the garden for safety and encourage others to garden			

Parking Lot			
Parking lot is landscaped with shade trees to shelter cars, people, and pavement			
For every 25 parking spots , there is at least 1 accessible parking spot that does not exceed 200 feet from an accessible entrance			
1 of every 6 accessible parking spaces is at least 11 feet wide to ensure that it is " van-accessible "			
Access aisles (space adjacent to the vehicular route that can accommodate a wheelchair lift with a vertical clearance) are at least 5 feet wide to provide enough clearance between the accessible spot and another parking space or sidewalk			
Accessible parking spaces are clearly marked with surface paint and signage			
Accessible parking spaces are closest to main entrance with accessible pathway			
Curb cuts are present to facilitate wheelchair access to entrance			
Wheeled carts are available to carry heavier items to apartments			
Light posts are 50 feet apart for luminaire uniform spacing			
Bonus - If any of these bonus indicators are present, add them to the 'Yes' column			
Bonus (+1 point): Outdoor adult playgrounds with low-impact equipment for increasing balance, flexibility, and cardiovascular fitness			
Bonus (+1 point): Water feature(s) available (e.g. fountain, small pond or waterfall feature)			
Bonus (+1 point): Greenhouse in the garden is maintained to provide gardening opportunities year-round			
Bonus (+1 point): Bike racks are available to residents			
Bonus (+1 point): Places for children to play			
Bonus (+1 point): At least 1 bag of soil is provided for each interested resident for use in garden beds			
Bonus (+1 point): Outdoor art and murals to invoke a sense of pride and positive impact on mental health			
Bonus (+1 point): Heated parking garage			

Tally the points in each category for Section A:

Outdoor Spaces/Facility Total Points:	Total Yes	Total No	Total N/A

Section B: FITNESS & WELLNESS

	Yes	No/ Unsure	N/A
Fitness			
Fitness classes are available on a weekly basis (e.g. tai chi , dancing) 			
Low-impact recreational/team games are available (e.g. croquet, bocce ball, lawn darts, horseshoes)			
Social fitness groups are available (e.g. walking group) 			
Indoor stairs are inviting (e.g. painted), central to use instead of elevator, and safe (e.g. handrails on both sides) 			
Signage is posted to educate residents about the benefits of using stairs			
Information on local health agency, clinics, and other supportive services is provided on-site 			
Amenities for dogs (e.g. stations for dog bags) 			
Indoor exercise equipment (e.g. treadmills and stair climbers) 			
Exercise equipment has clear instructions or graphics showing proper use			
Wellness			
Plants are present in indoor spaces			
Wellness programs/classes offered weekly/monthly (e.g. painting, weight loss, smoking cessation, fall prevention)			
Indoor spaces are decorated with art and pictures of nature			
Bonus - If any of these bonus indicators are present, add them to the 'Yes' column			
Bonus (+1 point): Pool for low-impact exercise			
Bonus (+1 point): Telehealth services in private area with video monitor to communicate with healthcare provider (e.g. blood pressure, oxygen levels, mild injury assessments)			
Bonus (+1 point): Health clinic on property 			
Bonus (+1 point): Staff to help with scheduling doctors appointments and transportation 			

Tally the points in each category for Section B:

Fitness and Wellness Total Points:	Total Yes	Total No	Total N/A

Section C: SOCIAL ENGAGEMENT & EDUCATION OPPORTUNITIES

	Yes	No/ Unsure	N/A
Social Engagement/Education Opportunities			
Space for entertainment (e.g. singers, children groups) 			
Activities such as art or music are affordable or free 			
Activities and teaching opportunities also include younger people (e.g. play games) 			
Life skills classes offered (e.g. computer skills, financial planning, healthy cooking, safety, scamming risks) 			
Social clubs/activities are regularly scheduled (e.g. book club, gardening, crafting, quilting, photography, or other hobbies) 			
Indoor areas for individuals and group games (e.g. cards, chess, puzzles) 			
Food preparation classes held in community kitchen 			
Opportunities to attend spiritual/faith-based gatherings offsite or at property 			
Coffee social hours for residents to interact			
Policy that allows pets for companionship			
Furniture on each floor and near entrances for resting and socializing			
Easy to find information about local volunteer and mentoring opportunities 			
Central location has clearly displayed large printed information about social activities, volunteer opportunities, property policies and nearby amenities 			
Public transportation schedules are posted in common areas or directly shared with residents			
Free/affordable transportation to and from volunteer and social activities or to grocery stores			
Residents have clear guidance and posted information on accessing dial-a-ride transportation services			

Residents are involved in the planning and preparation of social, fitness, and educational activities			
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Tally the points in each category for Section C:

Social Engagement and Education Opportunities Total Points:	Total Yes	Total No	Total N/A



Comments:















Phase 2:

Throughout Housing Facility and
Within Apartments

Section D: HOUSING FACILITY

	Yes	No/ Unsure	N/A
ENTRANCE, EXITS, AND LOBBY			
Exterior walkways and entrances are well-lit			
Entrance door easy to unlock, lock, open and close (i.e. no thumb- activated mechanisms)			
Lever door handles			
Exterior doors have secure locks that cannot accidentally lock you in or out			
Front desk staff can visually see entrance lobby area for security 			
Step-free path from parking to facility entrance that is level			
Bench or table near the entrance door for placing packages while locking or unlocking door			
Secure handrails on both sides of entrances, if steps are present			
Sensors for outdoor light fixtures to automatically turn lights on at dusk and off at dawn and/or when motion is detected			
Visible doorbell to ring front desk is placed 36 to 48 inches high next to front door			
Address numbers are large, illuminated, and visible from the street			
Sensor light at exterior focusing on front-door lock			
Entrances have awning for protection from elements			
At least one step-free main entrance 			
If no step free entrance, ramp needed (slope 12:1)			
If ramps, handrails on both sides with a height of 34 to 38 inches high			
An intercom system at entrances can allow visitors in 			
Main entrances have push button automatic doors 			
Non-slip/moisture-resistant flooring in foyer and entryway (e.g. vinyl- composition tile)			
Building layout information/signage is posted at entrances and each floor			

	Yes	No/ Unsure	N/A
Administrative offices are near entry with seating nearby and doors open for residents to visit 			
Elevator buttons in elevator lobbies and halls are centered 42 inches above floor			
Light switches are between 36 and 44 inches from floor			
Light switches are rocker-style, not dial or toggle switches			
Installation of energy-efficient windows with Low-E glass 			
Windows with views of nature and that allow light to shine throughout			
Stairways, Elevators, Hallways, Steps, Flooring			
Sturdy handrails on at least one side of hallways (1¼-inch diameter)			
Elevators can accommodate wheelchairs and emergency stretcher beds			
If carpeted , floor is a neutral solid color, if patterned, the design is uniform, subtle and neutral, not busy and has no dark spots			
Use distinctive/different furniture and color schemes in elevator lobby area on each floor for visual cues to reduce confusion			
If carpeted floor , use low density (less than ½-inch woven high pile), with firm pad			
Contrast strips on top and bottom of stairs and steps, and the step and riser (color/texture changes) 			
Non-slip adhesive strips applied to any uncarpeted steps			
Contrasting paint to distinguish surfaces (e.g. edges of stairs, walls from door frames or floors)			
Matte finishes for surfaces to reduce glare (e.g. floors and walls)			
Light fixtures to illuminate the stairs/soft path lighting for nighttime			
Sealed LED step-lights along hallway flooring in case of power failure			
Large area rugs are secured to the floor with double-sided tape or non-slip mats (no scatter or throw rugs) 			
Hallway entrances are minimum 36 inches wide 			
Hallways are at least 60 inches wide			
Light switches are between 36 and 44 inches from the floor			
Light switches are rocker-style, not dial or toggle switches			
Lever door handles 			







	Yes	No/ Unsure	N/A
Medical emergency response system to connect to fire, police with touch of button 			
COMMON AREAS			
Common area is level with 36-inch passage through and around space 			
Restrooms are located near common areas			
Community kitchen for gatherings, cooking or nutrition classes 			
Coffee station for residents to interact			
Partitions in common areas for noise abatement			
Computer station with low-cost or free internet 			
Doorway thresholds do not exceed ½-inch 			
Automatic electronic defibrillators (AEDs) on each floor for nurses or staff to use			
Furniture is mobile and can be moved around			
Light switches are between 36 and 44 inches from floor			
Light switches are rocker-style, not dial or toggle switches			
Accessible seating with backs and armrests to aid individuals in standing			
Lever door handles			
Electrical and phone cords are secured along walls			
Air temperature is set at a minimum of 65°F or higher			
Convenient telephone access or push buttons to call for help, accommodates those with hearing or vision impairments			
Easy-to-open windows from the inside for rooms above the first floor for natural lighting and views			
Electrical outlets are placed 18 to 24 inches from floor			
Halogen bulbs to reduce glare			
Installation of energy-efficient windows with Low-E glass			
Resources are provided such as games, books & other activities 			

Tally the points in each category for Section D:

Housing Facility Total Points:	Total Yes	Total No	Total N/A



Section E: WITHIN APARTMENT

(Guidance below is based on single-level apartments or other housing)

	Yes	No/ Unsure	N/A
Apartment Entrance			
Entrance door has a high (60-inch) peephole			
Entrance door has a low (43-inch) peephole			
Apartment door has deadbolt, and secure side latch or chain 			
Lever door handles			
Entry has a maximum ½-inch threshold, and when over ¼-inch, is beveled on both sides 			
Interior doorways are at least 32 inches wide 			
Main Living Area & Throughout Apartment			
Wheelchair T-turn space is 30 by 48 inches (60-inch diameter) clear of appliances, walls or furniture with spacious, open floor plan  			
Lamps and devices can automatically turn lights on and off at set times			
Light switches are between 36 to 44 inches from floor			
Light switches are rocker-style, not dial or toggle switches			
Lever door handles			
Hot water heaters have a maximum temperature of no higher than 120 °F			
If property has boiler room instead of water heaters, temperature sensors on faucets to monitor if water gets too hot or cold			
Mechanical fresh-air ventilation , installation of air returns in all rooms			
Programmable thermostats that enable different temperature settings throughout day			
Thermostats are between 36 and 48 inches from floor			
Air temperature set at a minimum of 65°F or higher			
Convenient telephone access or push buttons to use that accommodates those with hearing or vision impairments			
Electrical outlets are placed 18 to 24 inches from floor 			

	Yes	No/ Unsure	N/A
Installation of energy-efficient windows with Low-E glass			
Electrical and phone cords are secured along wall			
Plenty of easy-to-open windows from the inside with screens for rooms above first floor for natural lighting, views and fresh air			
Kitchen			
Lever-, touch-, pedal-, or sensor- style faucet			
Sink faucet is pressure-balanced, temperature-regulated and kept at or below 120°F, thermostatic or anti-scald controls			
Task lighting (increase illuminance for sink, stove, and countertops) 			
Microwave is placed countertop level			
Upper wall cabinets are mounted a maximum 48 inches above finished floor			
Base cabinets are level with countertop and do not exceed 34½ inches tall from finished floor			
Base cabinets are 23½ inches deep			
Pantry or full-height cabinet to avoid lifting stored food into upper cabinets			
Pull-down shelving within upper cabinet to avoid use of stool or step- ladder			
Pull-out cabinetry or shelves beneath countertops			
Lazy Susan cabinets in corner of cabinetry (turnable/rotating tray) 			
Open shelving for easy access to frequently used items			
Easy-to-grasp D shape or loop handles on cabinets and drawers, rather than knobs			
Accented stripes on edge of countertops to provide visual orientation of workspace			
Work surfaces are 34 inches maximum height; adjustable work surface is minimum of 29 inches high to a maximum of 36 inches high			
Seated workspace available (e.g. table, pullout work surface or removing lower cabinets)			
Lightweight , easy-to-use ABC-rated fire extinguisher in an easy-to reach place in kitchen			
Abundant light (ambient, accent, and natural task)			
Full spectrum light bulbs to simulate daylight			
Easy-to-read controls (large appliance controls with contrasting large text)			

	Yes	No/ Unsure	N/A
Appliance controls are near the front of the device at countertop height			
Appliance controls are below 54 inches in height			
Appliance controls have a maximum reach depth of 20 inches and a maximum high forward reach of 48 inches			
Side-by-side refrigerator/freezer with ice/water dispenser on door			
Side-hinged door oven or wall oven, elevated off ground			
Smart sensors to remind residents to close or turn off appliances			
Stove sensors to shut it off if temperature gets too hot or stove is left on for too long			
Raised dishwasher with push button controls (8 to 9 inches above floor)			
Electric cooktop with level burners have red warning light indicating when surface is hot			
Washer and dryer are front-loading and up off floor (12 to 15 inches above floor)			
Stay-cool handles on pots, pans, and implements			
Energy-efficient washer and dryers, dishwashers, and refrigerators (i.e. Energy Star)			
Bathroom			
Shower stall only, consider no tub, to reduce injury 			
Main bath stand-up shower has curbless (i.e. step-free) entry or threshold no higher than ½-inch			
Main bath stand-up shower entrance is a minimum of 36 inches wide			
Light in shower stall			
Night light is installed/plugged in			
Grab Bars in shower, bathtub, and beside toilet(s)  			
Grab Bars are a minimum of 42 inches long			
Shower/bathtub seats/bench fold down and are permanently installed			
Vanity at 32 to 34 inches with knee space, removable base cabinets if wheelchair needed and panel to protect user from pipes			
Adjustable/hand-held showerheads with a 6-foot flexible hose			
Shower spray unit has on/off control with a non-positive shut-off (i.e. controls flow)			
Slip-resistant flooring in bathroom and/or shower			
Non-slip strips in bathtub and/or shower			

	Yes	No/ Unsure	N/A
Toilet is 2½ inches higher than standard toilet (17 to 19 inches), or height- adjustable, or a toilet seat riser provided			
Contrasting-color edge border on countertops			
Toilet paper holder allows roll changes with one hand and continuous flow			
Bathroom door has minimum 32-inch clearance width 			
Bathroom door opens with lever handles			
Bathroom has minimum 60-inch turnaround or other approved turnaround configuration (30-inch x 48-inch clear space if door opens out) 			
Bedroom			
Closet has an adjustable hanging rod that can be moved anywhere between 20 to 54 inches on a mounted fixture with varying height slots			
Adjustable height closet system with multi-level adjustable shelves			
Walk-in closet has at least a 48-inch turning radius of floor space			
Lighting in closets			
Visible smoke/heat detectors are within 15 feet of any bedroom			
Carbon monoxide detectors are within 15 feet of each bedroom and can be heard from each room			
Furniture is mobile and can be moved around			
Bonus - If any of these bonus indicators are present, add them to the 'Yes' column			
Bonus (+1 point): Heating, ventilation, and air conditioning (HVAC) system in each apartment			
Bonus (+1 point): Touch or sound (clapping) controlled lamps			
Bonus (+1 point): Bed and chair fall guards to protect against falls out of bed or chair			
Bonus (+1 point): Common room computer screen has magnifying devices			
Bonus (+1 point): Iris™ Smart Hub wireless control system (thermostat, front door, alarm, individual lights)			
Bonus (+1 point): Monitors that allow for staff/family to check-in on residents			
Bonus (+1 point): Reminder Rosie , a voice-controlled clock and/or Alexa Amazon echo			
Bonus (+1 point): House-keeping services are available to residents			

	Yes	No/ Unsure	N/A
Bonus (+1 point): Laundry services are available to residents			

Tally the points in each category for Section E:

Within Apartment Total Points:	Total Yes	Total No	Total N/A












Comments:






















Phase 3:

Management & Operations

Section F: MANAGEMENT & OPERATIONS

	Yes	No/ Unsure	N/A
RESIDENTS' RIGHTS AND INPUT			
Residents have a copy of HUD rights and responsibilities 			
Residents received copy of resident handbook			
Resident Handbook is offered in several languages (i.e. Spanish) and professionally translated			
Resident survey is completed at least once every 1 to 3 years			
Residents know they have the right to file complaints with management, owners, or government agencies without retaliation, harassment or intimidation			
Residents know they have the right to organize and participate in decisions regarding the well-being of the property and their home such as having a resident advisory council			
Residents provided comment box to provide feedback anonymously 			
MANAGEMENT RESPONSIBILITIES			
Resident manager onsite or available 24/7 			
Resources for reporting elder abuse are posted 			
Management agents communicate with residents on all relevant issues 			
Cardiopulmonary resuscitation (CPR) or AEDs and first aid training provided to staff and residents yearly			
Operators and managers give prompt consideration to all valid resident complaints and resolve them as quickly as possible 			
Has a smoke-free policy 			
Share information on hoarding issues with staff and residents 			
Offer training to staff about how to help hoarders 			
Continuing education classes for management and staff specific to older adults and aging 			
Residents received clear documentation about the fees and monthly charges 			

	Yes	No/ Unsure	N/A
Residents and staff are educated about emergency plans and procedures 			
Communication plan is shared with residents and allows for resident input for emergencies, pest control, and policy changes 			
Entrance has a clear policy posted “Never Allow Strangers into Facility” and “Do not prop door open” 			
Clear policy and posted signs for “No Bullying Allowed or Aggressive Behavior by Staff or Residents” 			
Training for residents and staff about bullying 			
Management has policy ensuring equity and diversity of residents 			
Office space for visiting partners to work from (e.g. service providers) 			
MAINTENANCE RESPONSIBILITIES			
Protocol for broken elevators shared with residents 			
Pebbles and salt are removed from walkways and parking lots within 24 hours after storms (e.g. snow, ice) 			
Maintenance work orders are addressed in a timely manner 			
Urgent work orders that are considered to cause injury, threaten health, or cause serious property damage are taken care of as soon as possible 			
PEST CONTROL			
Contract with licensed pest/infestation control company for regular visits 			
“No Pesticide” signs are clearly marked on residents’ doors for those who have medical issues 			
Less toxic options for pest control available for those who have the “No Pesticide” signs up on doors (e.g. borax) 			
Residents are informed in several ways of pesticide usage at least 24 hours before spraying occurs 			
FIRE AND EMERGENCY SAFETY REGULATIONS			
Regular Fire Safety Drills (quarterly) 			
Regular tests of fire alarms (once a year)			
Annual fire safety inspections that are in accordance with federal and state requirements			
Protocol for sheltering in place when fire is NOT in their specific apartment unit			
Floor Warden System is in place, people designated to oversee and coordinate evacuation activities			

	Yes	No/ Unsure	N/A
Refuge areas are established for those who need extra assistance on higher floors of facility			
Fire exits/escape route maps are posted throughout facility in large print size (at least 12-point font size)			
Management and staff complete FEMA's online training courses 			
Signage and signals using sound, light, or strobe lights for emergency exiting			
Water leak sensors to detect flooding in laundry room, bathroom, and kitchen			
Residents have "bug out bag" with essentials prepared for few days away due to disaster			
Bonus - If any of these bonus indicators are present, add them to the 'Yes' column			
Bonus (+1 point): Create a lease video in different languages of what is allowed and disallowed at the property, etc.			
Bonus (+1 point): Security gate with security person to screen for those who should be on property 			
Bonus (+1 point): Latch on outside of apartment door or other feature so staff or other residents know if a resident has not left apartment in a while 			

Tally the points in each category for Section F:

Management & Operations Total Points:	Total Yes	Total No	Total N/A

Comments:

FINAL SCORING SHEET

Outdoor Spaces/Facility Total Points:		Place holder	
Fitness & Wellness Total Points:		Place holder	
Social Engagement & Education Opportunities Total Points:		Place holder	
Housing Facility Total Points:		Place holder	
Within Apartment Total Points:		Place holder	
Management & Operations Total Points:		Place holder	
NUMERATOR	Total Yes	+	Total Bonus
DENOMINATOR	259	-	Total N/A's
TOTAL SCORE	Nerator	/	Denominator

Sum all the totals calculated in Sections A-E, to fill the bolded boxes above. The first box will be the numerator and the second box will be the denominator. Now calculate the overall by dividing the numerator over denominator (for example, 254/259) to get a percentage and final score!

To improve your score, go back to the section where you were missing the most points and create an action plan to address shortcomings.

Bronze	Silver	Gold	Platinum
0-39%	40-59%	60-79%	80-100%

Acknowledgements: Karen Roof, Bradyn Nicholson, Rena Soller, Abby Bohannon, Sean Rusnak with Safe and Healthy Communities, Jefferson County Housing Authority, Loveland Housing Authority, Jefferson County Aging Well Housing Workgroup