



The Independent Living & Healthcare Agency Startup Checklist

Canada Edition: A practical readiness checklist for Independent Living, Group Homes, and Care Programs



SECTION 1: BUSINESS FOUNDATION CHECKLIST

- Define your care model (Independent Living, Group Home, Transitional, Disability, etc.)
- Identify your target population (youth aging out, adults with disabilities, seniors, etc.)
- Choose business structure (Sole Proprietorship / Corporation)
- Register business name (Provincial or Federal)
- Open business bank account
- Obtain general liability insurance
- Obtain property insurance (tenant + landlord aware)

- Set up basic accounting system (bookkeeping method)



SECTION 2: PROPERTY & HOUSING READINESS

- Confirm zoning allows residential use
- Confirm max occupancy for Independent Living
- Ensure property meets fire & safety standards
- Bedrooms meet size and egress requirements
- Install smoke detectors and fire extinguishers
- Develop house layout plan (rooms, shared spaces)
- Furnish bedrooms and common areas
- Create house rules and expectations



SECTION 3: CLIENT & RESIDENT INTAKE

- Define eligibility criteria

- Create intake screening checklist
- Develop resident agreement
- Create house rules document
- Plan move-in process
- Identify referral sources (agencies, CFS, supports)
- Set monthly pricing per resident
- Plan rent collection method



SECTION 4: COMPLIANCE & RISK AWARENESS

- Understand Independent Living vs Licensed Care
- Know the 3-resident threshold (Alberta reference)
- Understand when licensing is required
- Obtain appropriate insurance coverage
- Create incident reporting process

Develop emergency response plan Establish conflict management rules Understand eviction process basics

Important: Educational checklist only – verify all requirements with local authorities in your province.



SECTION 5: OPERATIONS & SCALING READINESS

 Set monthly operating budget Plan vacancy buffer Track income and expenses Understand when NOT to scale Know indicators for licensing transition Plan for second property (future) Decide when coaching or mentorship is needed

★ Important Note on Success

This checklist is a starting point, not a substitute for proper planning.

Independent Living is often the gateway into the healthcare and housing industry, but success depends on structure, compliance, and decision-making.

Many operators choose mentorship or coaching to avoid costly mistakes, delays, or shutdowns.

Created by: Garnet Jr Chambers

Founder, SBG Coaching & Consulting