

SENIORS' GUIDE TO

# DOWNSIZING



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IS IT THE RIGHT TIME? *What to factor into the decision*

PICKING YOUR NEXT HOME  
*What are your options?*

THE MOVING PROCESS  
*What to keep, How to pack, & Selling the house*

# Downsizing



No matter how much you plan for it, being faced with the decision of downsizing can be extremely overwhelming. For seniors, it can be devastating as their home may be full of items accumulated over the years of their life. Even the CDC recognizes that change is one of the highest stressors for senior citizens. On the other hand, many seniors may be excited at the opportunity to pare down and move to a smaller place that requires much less upkeep. Downsizing, in and of itself can be a stressful experience, but it can be done. With a little compassion, forethought, and decisiveness, the process of downsizing will become less daunting.

Communication and organization are critical when it comes to moving a senior loved one into a new home or living facility. To make the whole process as seamless as possible, consider creating a calendar that can be shared with the senior and others involved in the move. Communicating a timeline with expected dates helps everyone involved stay on the same page during the process. Consider adding dates for decluttering specific rooms or areas, donation pickups and/or drop-offs, movers pick up items, moving sale, moving day, and unpacking day. Seeing these specific dates scheduled out can assist with the transitional process of moving to a new location.

As you or a senior loved one prepares to move to a new home, we've created a short guide with a few tips and ideas to make the process as simple and stress-free as possible.

# IS IT TIME?



Making the decision to downsize can stem from many places. If one is attempting to downsize for health, relocation, or financial reasons, this can be a great place to start from. Determining why seniors want or need to downsize is crucial to making the process easier. At one point the person's home may have felt too small, but now the home may be overwhelming and impossible to keep up with as they age.

A few tips to help you decide if it's the time a senior to downsize:

## UNUSED SPACE

Are there unused rooms and spaces in their home? This includes rooms AND closets that are rarely entered or cleaned. Consider that those spaces need to be heated and cooled, plus the taxes that must be paid on that space. Don't forget to think about the lawn as well. When it becomes difficult to maintain the landscaping around the home, it's a usual sign that it's time to consider a smaller space with less upkeep.

## DISTANCE FROM SUPPORT

Is there a support system for the senior? Are they within a drivable distance? If someone is feeling separated and stuck because their friends and family aren't nearby, this is another great reason to consider downsizing to move closer to their friends and family.

## VALUE OF HOME & IT'S ITEMS

Most home values increase over time and that may definitely be the case for a senior who has been in their home for decades. Consider having the property assessed and see if it's worth it to sell and move to a smaller space. Also, think about what items are in the space that remains unused. Items like antiques, rarely used appliances, or anything that may have been stashed away in closets or basements for a long period of time. Items of value may be hiding in these unsuspecting places around the home. Whenever there is an abundance of unused items or constantly misplaced items, it is usually an indicator of too much space.

## ADDITIONAL CARE NEEDS

It may not be an issue related to the home, but it might be because the senior has additional health care needs that can no longer be addressed in their current home. Will the bathroom need major modification if a senior chooses to stay in this home? Can their budget afford this remodel, if necessary? This is also important to consider if they have mobility issues and can no longer reach certain parts of their home or maintain their property in the ways they once could.

## GET A HEAD START

Ultimately, downsizing before a senior has to move is ideal. When downsizing is forced in a time-sensitive scenario, it can be more stressful and overwhelming than it needs to be. Waiting until the senior is absolutely ready to move can be problematic, so addressing it well in advance is better for everyone involved with the senior's move.

# THE NEXT HOME



After making the decision to downsize, it is important to know where and what kind of home senior will be moving into. Does the senior have health or financial issues to consider? Are they moving into a home with family members? Nursing homes or assisted living? Renting a new apartment? Knowing their next destination will help the downsizing process from the beginning as they decide what to keep.

**TIP:** *If the senior is moving into a new apartment or new senior living community, try to acclimate them to their new surroundings by introducing them to those who can help them in their new homes. For example, the property manager they can call should anything break within their apartment or the community manager who can help them if they have an issue in their senior living community.*

Keep in mind that seniors may be reluctant to downsize and relocate, but open communication about their next steps is key to streamlining the downsizing process for everyone.

**TIP:** *If a senior is moving into a senior living community, they may already have a suggested packing or “items needed” list. Ask your community manager about the items they recommend for seniors moving into their community. Use that list as a basis for what items are kept and what may be donated or sold.*

# KEEP OR TOSS?

Give you and your loved one plenty of time to start this process. Give yourselves more time than you think you'll need. Prepare for these days in advance - get a good night's rest, eat breakfast, and take breaks as you need to. Deciding what to keep and what to toss often brings up unresolved feelings, memories, and unexpected responses. Don't rush and don't make it stressful.

## KEEP IT SHORT

Don't try to do this in a marathon. Try to do this in short sessions at first in the small, simple rooms of the home. As the downsizing picks up, the senior may continue to find momentum and confidence in the downsizing process.



## ONE ROOM AT A TIME

Start with a small room in the home. Think about spaces in the home that don't have many emotional attachments - laundry rooms, coat & linen closets, etc. If the senior is moving into a one-bedroom apartment, do they need six sets of sheets? Probably not, 2-3 sets would probably be sufficient. Are they going into a home with fewer bathrooms? You can probably donate some of the extra towels. Is the kitchen significantly smaller? Downsize to one coffee pot, one set of pans, and so on.

## TOSS THE OLD & EXPIRED ITEMS

As you are starting with short sessions, one room at a time, obviously toss the items that are expired, outdated, broken, canceled, etc. Don't waste the energy of holding onto items that are actually trash or just taking up valuable space. Think about old articles of clothing that have been stored for decades because surely someone will wear them again! Do those really need to be kept? What about old magazines that were kept for recipes...that were never ever made. Those can go as well. Save yourselves the stress and just discard the items that have already served their purpose.

## KEEP IT LIGHT

Some professionals suggest tackling large decluttering projects during daylight hours. The reasoning behind this suggests that light makes an item easier to see and may make it easier to deal with - for either saving or discarding.

## SECURE IMPORTANT DOCUMENTS

Early on, it may be beneficial to locate and secure all important documents, so they aren't accidentally tossed into the trash while decluttering. Gather up wills, deeds, insurance policies, passports, birth certificates, medical & military records, degrees, etc. Those documents can be placed in one filing cabinet, with a trusted family member, or even a safe deposit box during the moving process.

## ROOMS NOT IN THE NEW HOUSE

Does the senior's new home have a garage, attic, or office space? If not, consider those next as they won't be in the senior's new home. Items from these rooms may have significant items to sell or donate. Pull out the items the senior already knows they definitely want to keep and pack those away for moving. Then, assess what's left behind to sell, donate, or toss.

# YES OR NO ONLY

Make piles for “yes” and “no,” never a “maybe.” Adding that third option results in no real progress being made in your downsizing efforts. Being clear about what stays and what goes is key to making the process work. Be very mindful of items that are regularly used and what items are expected to be used in the new home. If it’s been sitting unused for six months or more, let it go. Take an honest look at all of the items and whether or not they are items that genuinely need to be kept. Use “yes or no” questions for every item. For example: “Do I really need three types of toasters?” Likely, that answer is no. Keep one and discard the others appropriately. If it hasn’t been dealt with in the current home- it won’t be dealt with in the new home either.

## KEEP THE MOST USED ITEMS

While some family members may prefer the newest version of a piece of furniture or an appliance, a senior citizen may instead prefer an older item. Just because an item is brand new, it may not be worth it to move it to a new location if it isn’t used.

## COLLECTED/SENTIMENTAL ITEMS

These items can be extremely difficult to part with. Collections often symbolize a lifetime's worth of memories for a hobby or passion project. Many collected items simply wind up in a box, never to be seen or sorted through again. Since these items may tug at the heartstrings, discuss which ones are the senior's favorites and decide to keep the favorite items...only. Once you've decided on the favorites, take some high-quality photos of the remaining items, and dispose of the items accordingly. You could potentially get those photos printed in a nice photo book that sits out on the coffee table instead. Actually getting to look at those precious items, even if in photo form, sparks more joy than any items stashed in a box out of sight..

## GENERATIONAL HEIRLOOMS

If some of these items are meant to be a gift for someone later in life, encourage the senior to gift it now so that it no longer has to be stored. This is also a great time to see if there are any items in the home that another family member would like to have in their home. Giving away certain items to family members may make everyone happier in the long run. It's important to note that children and grandchildren may not want any of your heirlooms, furniture, or other household items. Recognizing that is crucial as the senior decides what to keep and what to discard.



# MAKE IT A FAMILY PROJECT

Invite family members to help with the downsizing process. Invite siblings, grandchildren, or even a close family friend to assist for a weekend or an afternoon. Give the senior a chance to share the stories about their items and reminisce with their loved ones as part of the downsizing process. It's a gentle reminder that memories are about people, not the objects..

**TIP:** *This is the perfect opportunity for family members to come and claim their old keepsakes. The old soccer trophy, old yearbooks, and other items of nostalgia should go home with their original owners, if possible.*

# DONATE OR SELL

By all means, if you know there are certain items that will have a high cash value, sell the item. Things like musical instruments, cars, fine china or glassware, jewelry, etc. may have enough value to consider selling on Craigslist, eBay, or local consignment shops. Also, keep in mind that while some items were an expensive purchase up front may no longer have resale value. Don't waste valuable time trying to sell something small just because you're not getting the offers you want. Donating items that can still be used may be a better use of your time and resources, especially if they are an organization that accepts all items. Ensure that you get a tax receipt for any items donated. Selling excess items through yard/garage sales and putting items on the curb with a "FREE" sign are also options if you're trying to downsize quickly.

**TIP:** *There are options for donations that aren't just your local Goodwill or Salvation Army. Many churches and community organizations may have a use for furniture that a senior no longer needs. This furniture is often gifted to people who are being rehomed after crises or after immigration. Often, schools and community theatres may have a use for vintage or outdated clothing for costuming their upcoming performances. Animal shelters often take old sheets and towels for the animals in their care. Don't be afraid to look into what other options may be available for donations in your community.*

# HANDLING TRASH OR HAZARDOUS WASTE

If the senior's home might have a lot of trash or debris, it may be worth it to consider renting a small dumpster that can be placed outside while downsizing. Check with available resources for trash management in your area - some have limits on how much trash they can haul away at a time. It's also common to find old paint, sprays, oils, and other expired harmful materials. Check your community's resources for hazardous waste disposal so that toxic chemicals can be properly discarded.

**TIP:** *If a senior has a lot of paper waste that should be shredded, consider hiring a service to come to pick up and shred the papers for you. It's a time-consuming task that is not hard to outsource. Also, dispose of old electronics appropriately. Many communities have a large item pick up day or a place to properly dispose of old electronics - particularly old computers and televisions.*

## IT'S A LABOR OF LOVE

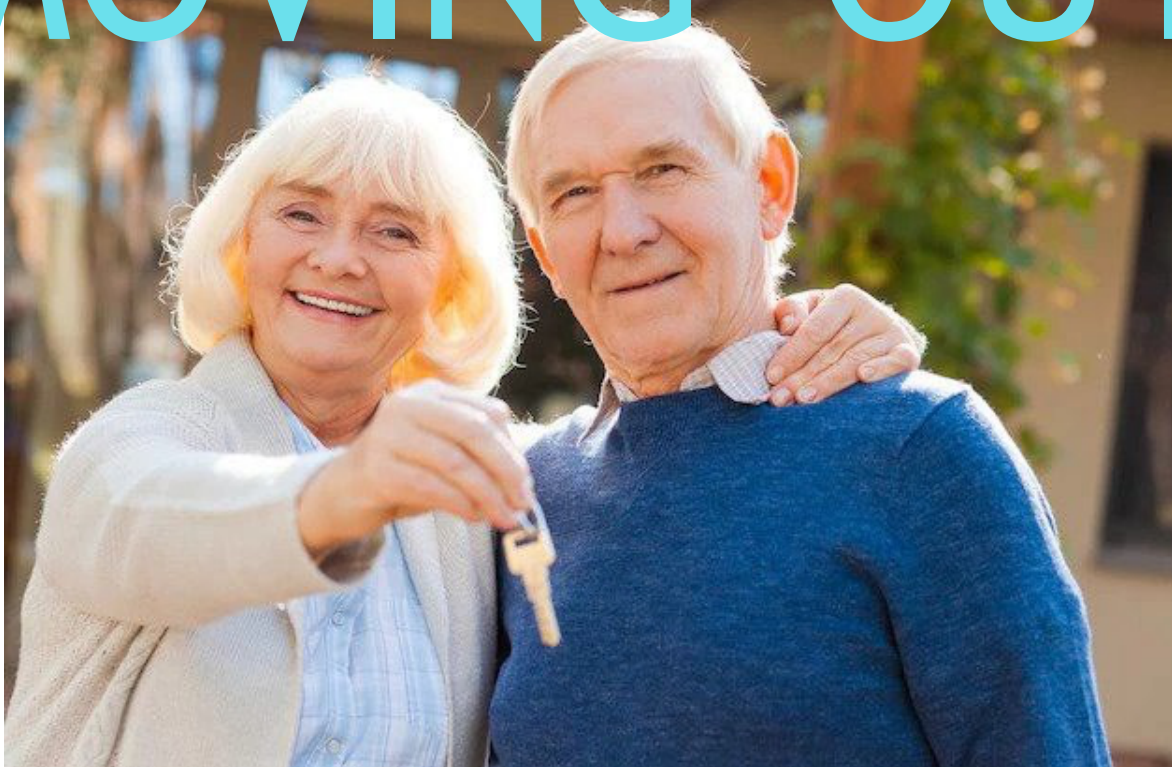
Anyone who has had to purge and go through a loved one's items after a death or other emergency knows how taxing this process can be. Sure, someone may find a few cherished items here and there, but going through this process together while everyone is healthy enough to participate is much less stressful.

## CONSIDER HIRING A PROFESSIONAL

If you have a senior loved one who is struggling with shame, feeling judged, or just letting things go, bring in a neutral professional who is trained in helping others let go of items. The National Association of Productivity & Organizing Professionals can connect you with an organizer in your particular area.

**TIP:** *If the moving senior just can't part with a certain item, put it in a storage unit. And if they haven't pulled it out or used it within the next 6 months, toss it. Chances are, no one will ever miss it.*

# MOVING OUT



Relocation stress is a real thing and can affect seniors, especially if they are being forced to move. Keep your eyes open for signs of excess stress in your loved ones during the process. Symptoms like anxiety, grief, exhaustion, or sleep disturbances may show that the senior is feeling stress about their new situation. By allowing the senior to maintain control and honoring their requests and questions about the process, you may be able to reduce the effects of relocation stress.

**TIP:** *Use up as many household items as possible so they don't have to be moved. Items like toilet paper and other perishables should be used up so that they are one less thing to move on moving day.*

If your loved one is moving into a senior living community, ask if they'll allow new residents an opportunity to stay a few nights before completing the move. Having an opportunity to attend meals, meet new neighbors, or enjoy a community event may make a huge difference in their adjustment process. Getting an idea of what life may be like in their new home is a key step in finding the right fit for the senior. Staying positive about a new environment and the simplicity of their new surroundings can also ease the transition.

**TIP:** *Make lists! As with any move, it's important to know what you're packing up to move to the new place. Keeping a list of what items are in what boxes may be helpful if not all the boxes or items arrive at the new location.*

Depending on how far the senior is moving, another component of the process is deciding how their belongings will get to their new home. There are several options to aid the senior in the moving process. From shipping cubes to full-service movers, to packing up a rented truck yourself, you can find a service that fits the senior's moving budget. In recent years, there has been a major increase in senior move specialists. As they focus primarily on the senior market, they are trained to help seniors with cleaning, packing, and moving need that are specific for downsizing. Many specialists also assist with unloading items through donation or estate sales depending on a senior's specific needs. According to the National Association of Senior Move Managers, there are almost 1,000 companies across the United States that specialize in these specific moves.



**TIP:** *Once the senior has decided to move, don't forget to change their address with the United States Postal Service and other service providers. This may include lawyers, the BMV, insurance agents, bank, church, voter registrations, etc.*

# CLEANING & REPAIRS



Whenever anyone moves anywhere, it's important to remember there's still work to be done. In general, once a home is packed up and belongings have been moved to a new location, this is the prime time to do a thorough cleaning of the home and address any repairs that may need to be done before a home is passed on to new residents. Dealing with maintenance in one fell swoop is easier than spreading it all out over several weeks. If you're planning to sell the home, this is the time to look into what may increase the selling value (or rental value) in the home. Consult a real estate agent to offer any advice that may make the home more desirable in its next market.

# SETTLING IN



Once a senior has moved to a new home, their loved ones can still assist in helping them feel more at home in their new surroundings. Hopefully, they've been able to bring the items that mean the most to them and want to have in their new homes.

A few ways to help a senior relax into their new surroundings include:

Putting important items out for their enjoyment - hanging their favorite photos, artwork, and displaying favorite home decor items, etc.

Setting up clear pathways from room to room - keeping obstacles to a minimum helps prevent falls or injuries, making sure rugs are always laying flat, and there are grab bars installed, if necessary.

Designing spaces for easiest use - ensuring the items that they'll need the most are easiest to access (medications in low cabinets, pots & pans are easy to grab, etc.).

Creating systems for items coming in and out of the home - i.e. where and when to get the mail, when and where to take out the trash/recycling.

Knowing their community - making sure they know who can help in an emergency or maintenance situation, knowing ways to get involved in their new community, and how to find other crucial resources can help with adjustment.

# LET'S TALK ABOUT IT



It may be hard to have the conversation to get a senior started on downsizing their home and possessions. A little shift in perspective and a positive attitude about the process can make all the difference. Instead of using the term "downsizing," think about using the new buzzword "rightsizing." This term has a more positive connotation as it relates more to a senior's new home as the best (or right) fit for this season of their life.

After spending decades of life living in one home, the number of items that accumulate can be substantial. Taking the time now to address the items that have piled up over the years is crucial to easing a senior citizen into a new home or way of life. Plan time to downsize, take it slowly, start small and with intent, and ask for help as you or your loved ones prepare to embark on the downsizing process.