



## Fact Sheet: **Downsizing a Home: A Checklist for Caregivers**

### **Introduction**

Moving is a high-stress life event, the experts tell us, and they're right. Whether it's cross-town or cross-country, whether to a small apartment or a large suburban home, tackling the organizing, packing, discarding, cleaning, paperwork and the myriad other tasks is a major challenge.

When you're older and moving from the family home to a new smaller residence, possibly in a new community or your adult child's home, sorting through decades of family history and possessions can feel overwhelming—even paralyzing.

As we progress through life, moving may signal new opportunities, a new relationship, a new adventure ahead. For an older adult this "new" opportunity may feel like a mixed blessing. On the positive side, a move may offer a sense of "lightening" to reduce the messy clutter of a family's history, fewer home and yard chores and can help reduce feelings of isolation of living alone. More often, this relocation can be an unwelcome admission of frailty, loneliness, possible serious illness, and a loss of independence.

This fact sheet offers a handy guide to save time, energy and sleepless nights. Most importantly, the checklist below provides a tool to help you organize your move and help it progress as smoothly as possible. Since every situation is

different, select the areas that apply to you, and add your own notes in the spaces provided below.

If you are facing a crisis, such as moving a parent into an assisted care residence after a caregiving spouse dies, or into a nursing home after a devastating stroke, the process will be condensed, and planning time will be minimal. This may be the most challenging experience of all. We encourage you to get as much help and support as you can from friends, family, religious communities and social service organizations. (For more information, see fact sheet *Home Away from Home: Relocating Your Parents.*)

If you are an adult child helping your parent make this move, we hope this also offers advice on how to be both supportive and efficient as you and your loved ones manage this major life event.

### **Planning Ahead**

If you have the luxury of time, and if your parent is willing, think about beginning to declutter before a move is on the near horizon. Six months or a year prior to moving is not too early to start this process, regardless of where your parent is planning to move, or even if your family is still deciding.

- Shred, toss or give away obvious items such as old cancelled checks, outdated food or medications, clothes,

or extraneous household items that just take up space.

- If you're not sure, ask an accountant or tax person what records need to be retained.
- Continue this decluttering process monthly until you start the major activities of sorting and packing for the move. You'll be surprised at how much you can eliminate before you get into the emotional quandaries of dealing with prized possessions.
- Collect and keep together important papers: deeds, wills, Durable Powers of Attorney, medical records, military records, diplomas and degrees, birth certificates, passports. These can be in a file cabinet or safe-deposit box, but let key family members know where they are.
- Try not to allow grown children to use the home as a storage unit or museum. Now is the time for them to claim their keepsakes—old sports trophies, CDs, posters, school projects--and remove them from their parent's house.
- Throughout the process, try to limit sorting and packing activities to no more than two hours per day for your parent. Try to keep it relaxed and companionable. Have a cup of tea (or glass of wine!) and take breaks.

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**Where to Start**

- Make lists: start a separate notebook just for the move. Keep it with you, and whenever you think of something—anything at all related to the move—write it down. Include to-do lists, a calendar/timeline, things you're likely to forget, questions about the new residence, floor plans. Even anecdotes or historical notes about possessions, or offhand remarks like "Oh, Aunt Judy would love this tea set." Although the notebook may not be particularly orderly, at least you'll know where to find the information.
- Find and get estimates from moving companies. Some fees may be negotiable if you plan ahead and schedule the move for nonpeak times.
- Set a firm date for the move.
- Make a floor plan or template of the new home, whether it's one room or something larger. Be sure measurements are accurate, and reflect placement of doors, windows, appliances, built-in shelves, linen storage, heater vents, etc. You now know precisely how much space you will have; you don't need to guess.
- Make a preliminary plan of where major furniture will go in the new place—bed, couch, table and chairs, TV, bookshelf, dresser and desk, for example. Again, measure carefully. If pieces can serve more than one purpose, all the better.
- If finances allow, think about hiring a move manager, senior relocation specialist or organizer. Fees vary across the country. A real estate agent may be a good referral source to find this specialist, or get recommendations from friends,

seniors' residences or senior centers. This person can help with all or part of:

- sorting and decision-making
- packing
- arranging the move
- arranging for charity pick up, garage sale, estate sale or consignment shops
- unpacking boxes and arranging new home
- If pets are involved, be sure to have a plan for them to be moved and accommodated in the new home.
- If needed, change providers for utilities such as gas and electricity.
- Refill prescriptions in advance.

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**Paperwork**

- Complete address changes:
  - post office
  - credit cards
  - bank accounts
  - investment/retirement accounts
  - Medicare & Social Security
  - voter's registration
  - family & friends
  - driver's license/car registration

- newspaper/magazine subscriptions
- social clubs & places of worship
- notify lawyer, accountant, insurance agent, other

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**Next Step: Sorting**

- Plan on going through one room at a time. Start with the easiest. Don't try to pack now, just sort.
- Divide furniture and possessions into four categories:
  - definitely save (these are the most useful, most beloved, most meaningful items)
  - possibly save (you'll need to revisit these later, and continue paring down)
  - donate, sell or giving away to a friend
  - discard
- Use colored tags or stickers to indicate in which category items belong, e.g., **green=save**, **orange=possibly save**, **blue=donate/sell**, **red=discard**.
- This is the time to designate items to be given to specific people. Make a list.
- Items that have much sentimental value but are not likely to be taken can be memorialized in photographs.

Later, you can put these on a DVD or into an album.

- Don't try to sort paperwork or photos at this point, unless it's immediately obvious certain items are not needed or wanted. This kind of decision-making takes too long and is too draining. Pack it up and it can be sorted in the new home. Shred discarded paperwork.
- The number of kitchen items should be greatly reduced if your parent is going to a residence or facility that serves meals.
- If possible, and if the move is not far from the family home, move your parent out first, taking only the designated furniture and items he/she wants and needs. Leave the rest of the household goods and clean-up to be dealt with after the move. (Also, items will be available for retrieval if it turns out they're missed.)
- Be patient and allow time at this stage for your parent to talk about memories, to reminisce about family activities or relatives no longer with you, to acknowledge emotions. This can be a nice opportunity for you both to remember the stories and incidents that are part of your history and that make each family unique.
- Don't go overboard purging items to take — you can keep some collectibles, especially if they're small. You want the new residence to look like a home, not a motel room!

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**Packing**

- Welcome others to help with packing chores: family members, friends, the move specialist or moving company. With everything pre-labeled, the task is easier and fairly mechanical.
- Label all boxes with their destination room/area in the new residence.
- Moving companies can supply specialized containers, e.g., wardrobe boxes, so you can leave clothes on hangers.
- Pack "open first" box(es). The contents are for setting up sleeping accommodations and the bathroom. Include items such as fresh bedding, soap, toilet paper, toothpaste & toothbrush, comb, nightclothes, towel, plate and utensils, one change of clothes, flashlight, tape, scissors.
- Pack other important items that you'll keep with you during the move: new lease or residence contract, keys, medications, legal documents, checkbook, cell phone, address book, first-aid kit, extra cash, your relocation notebook. Label this container. Valuables such as jewelry should be in a safe-deposit box unless items are worn regularly.

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## Unneeded items

- Discard items that are so marked. You may need to call for extra trash pick-ups.
- Give away items as designated. If your parent agrees, offer friends and family members additional keepsakes.
- Before selling items, get an appraisal from an expert such as a jeweler, art collector or someone knowledgeable about rare books if you're not sure of the value.
- Furniture and other items can go to:
  - estate sale companies
  - auction or "want ad" websites such as eBay or craigslist
  - consignment shops
  - garage sale, if someone has time and is willing to organize and operate it. (It may be distressing to your parent to see people going through their possessions.)
- Donate the remainder of items to charities that will pick them up.

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## Moving

- Be sure you have a written contract from the moving company and clear idea of coverage for lost or damaged possessions.
- Get a firm time for their arrival, at both the old and new residences.
- Check inventory lists.

- Check payment options: credit card or check?
- Have someone assigned to meet the movers at the new residence. Be sure they have a key! If this is a facility, be sure the manager is expecting you.
- Ensure that all boxes are properly labeled.
- Use the "open first" boxes to set up the bedroom and bathroom immediately.
- Prepare to spend a few days unpacking and organizing. Get someone to help if you can. Work as quickly as you can to make this new home feel homelike.

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## Settling in

Plan to check in often with your parent. Adjusting to the new surroundings may take days, weeks, months. Individuals' reactions differ after such an upheaval in their lives. Many people feel relief at not being alone and not having to maintain a large house. Others may be withdrawn and hesitant about making new friends. Many grieve the loss of their old community and friends. And sometimes, the reaction is: "I should have done this years ago!"

## Resources

### **Southern Caregiver Resource Center**

3675 Ruffin Road, Suite 230  
San Diego, CA 92123  
(858) 268-4432 | (800) 827-1008 (in CA)  
Fax: (858) 268-7816  
E-mail: [scrc@caregivercenter.org](mailto:scrc@caregivercenter.org)  
Website: [www.caregivercenter.org](http://www.caregivercenter.org)

The Southern Caregiver Resource Center offers services to family caregivers of adults with chronic and disabling health conditions and is for residents of San Diego and Imperial counties. Services include information and referral, counseling, family consultation and case management, legal and financial consultation, respite care, education and training, and support groups.

### **Family Caregiver Alliance**

#### ***National Center on Caregiving***

(415) 434-3388 | (800) 445-8106  
Web site: [www.caregiver.org](http://www.caregiver.org)  
E-mail: [info@caregiver.org](mailto:info@caregiver.org)

Family Caregiver Alliance (FCA) seeks to improve the quality of life for caregivers through education, services, research and advocacy. Through its National Center on Caregiving, FCA offers information on current social, public policy and caregiving issues and provides assistance in the development of public and private programs for caregivers.

### **National Association of Senior Move Managers**

[www.nasmm.org](http://www.nasmm.org)

### **Senior Move Managers**

[www.moveseniors.com](http://www.moveseniors.com)

## Recommended Reading

*"Downsizing: 20 Tips to Help You Get Rid of Junk"*. [www.caring.com](http://www.caring.com)

*Moving On: A Practical Guide to Downsizing the Family Home*, Hetzer, L. and Hulstrand, J., 2004, Stewart, Tabori & Chang Publishers.

### **Fact Sheet**

*Home Away from Home: Relocating Your Parents*