Happiness resides not in possessions and not in gold, happiness dwells in the soul.
Democritus

Rationale:
The United States Census Bureau estimates that the average person will move 11.7
times during his or her lifetime. Although there are many reasons for a person to
consider moving, downsizing to a smaller home has become a recent trend. Smaller
homes typically require less maintenance and can result in significant savings for the
homeowner. Older adults are often interested in downsizing to simplify their lifestyle,
live closer to grandchildren or provide additional income to meet their retirement
goals.

Program Goal:
To assist participants in understanding the process of downsizing to a smaller home.

Program Objectives:
• To understand the steps of the downsizing process.
• To identify strategies for preparing a home for downsizing.
• To identify strategies for preparing for the move into a new, smaller home.

Facility and Equipment Requirements:
• Table and chairs for participants.
• Projector for Power Point presentation.

Pre-Program Preparation:
• Copy The Ins and Outs of Downsizing Your Home publication.
• Copy the Downsizing: What are my Housing Options? handout.
• Copy the Downsizing: Learning to Let Go handout.

Estimated Program Delivery Time:
• This program will take approximately 45 minutes to complete.
Introduction:
Before making the decision to downsize, it is important to evaluate the benefits and disadvantages associated with moving into a smaller home. At times, the decision to downsize may be due to necessity rather than personal preference; the loss of a spouse or an illness may prevent an individual from being able to afford and maintain a larger home. The decision also results from a desire to save money and be close to family. Regardless of why someone decides to downsize, it is a wonderful time to declutter in preparation for the move. It is important for people who are downsizing to consider all available housing options and which items will be needed to suit their new lifestyle.

Introduction Activity:
As the facilitator, explain that many individuals think about downsizing at some point. The decision to downsize may be the result of older children moving out of the family home, a desire to simplify one's lifestyle, wanting to be closer to family or a desire to meet retirement goals. If downsizing is something that you are considering, it is important to understand the process of downsizing so that you may develop a sound plan. For many individuals, getting to the planning stage itself can be intimidating.

Ask the participants to discuss the following questions:
- Why are you considering downsizing your home?
- Do you have any concerns about downsizing? If so, what are they?
- As of this moment, do you have a plan for downsizing? If so, what is it?

State to the group that many individuals downsize for similar reasons and report the same concerns that you do. Emphasize that it is okay to be unsure how to tackle the downsizing process. It is important to realize that there are things that can be done now to address your concerns and to plan for a successful downsizing experience. Downsizing your home is a great way to improve your chances of living a lifestyle that will fulfill all of your wants and needs.

Objective 1: To understand the steps of the downsizing process

As the facilitator, explain that the downsizing process involves a lot of decisions that can leave someone who is downsizing feeling overwhelmed. While it is common to feel this way, learning about and preparing yourself for the downsizing process is the
best thing that you can do to eliminate stress. There are several steps to the downsizing process:

1. Research and select an appropriate housing option. Before making the decision to downsize, you need to look into the housing options available to you. You may decide to move to a smaller home, retirement community or assisted-living facility, to name a few options. Selecting the best housing option for you will give you an idea how much space you will have in your new residence.
2. Next, you will need to sort through your possessions to determine which items you will keep, donate, sell, gift or discard before the move to your new home.
3. The third and final step to the downsizing process is to prepare for the move to your new home.

One of the most intimidating steps of this process is to select a housing option that will best meet your wants and needs. However, familiarizing yourself with available options is a great way to start the process.

Learning Activity 1: Downsizing: What are My Housing Options?
Ask the participants if they have thought about the housing options available to them for downsizing. Explain that it is important to realize that selecting a new home is a decision that requires careful research and thought. Divide the participants into three groups. If the group is particularly large, you may consider five groups. Five to seven participants per group is ideal. Provide each participant with the Downsizing: What are My Housing Options? handout. Ask the participants to take five to seven minutes to complete the handout together with their group. Each group should identify a spokesperson. Following completion of the handout, each group should share the pros and cons of one housing option.

Objective 2: To identify strategies for preparing a home for downsizing

As the facilitator, explain to the participants that downsizing requires the difficult task of sorting through your possessions. Sorting through your personal items will help you to determine which items will be moving with you and which will be staying behind. It takes a considerable amount of time to go through this process. In general, it is a good idea to start with the room that you use least often and then gradually move through your home, one room at a time. Developing a sorting system is a great way to make this process feel doable. The following sorting system is one that may be particularly helpful:

1. Gather sorting supplies – pencil, paper, labels, boxes and packing supplies.
2. Label five boxes: keep, gift, donate, sell and discard. As you are sorting through your belongings, place items in the appropriate boxes.
3. If you are considering selling or gifting a particular item, label each item as you go. For items that you will be selling, price the item with a sticker. For items that you are considering gifting, label the item with the recipient's name.
4. Items that hold significant meaning to you are often hard to part with. It may be helpful to gather your family to discuss the significance of the item and then determine whether or not you are able to let go of it.

Learning Activity 2: Learning to Let Go
Pass out the *Downsizing: Learning to Let Go* handout and instruct the participants to follow the directions. Each individual will identify three items in their home that they can easily part with and three items that they do not think they can part with easily. Then ask participants to develop three questions that will help them to decide whether or not to keep the items that they think would be hard to let go. Following completion of the exercise, ask the group to answer the following questions:
- Were you able to develop a plan for deciding what to do with difficult to part with items? If so, what is it?
- Why do you think it is easier to let go of the first three items that you identified compared to the hard to part with items?

Objective 3: To identify strategies for preparing for the move into a new, smaller home

Explain to the participants that, while selecting a new home and preparing your old home for downsizing, it is easy to forget about preparing for the move to your new home. However, whether you are planning to move cross-town or cross-country, it is important to make sure that you are well prepared before moving day arrives. There are many moving tasks that you need to think about. These tasks will range from how you will physically move your possessions to how you will notify various individuals and businesses about your move.

Learning Activity 3: Moving Checklist
Divide the participants into three groups. If the group is particularly large, you may consider five groups. Five to seven participants per group is ideal. Ask the groups to identify a recorder and a spokesperson. Ask each group to work together to make a moving checklist. The checklist should include the following: what should be done
prior to moving day, on moving day and immediately after moving day. Following completion of the activity, ask each group to share their list.

**Summary:**
Downsizing is a great way to simplify your lifestyle and meet your retirement goals. Whether you are moving cross-town, -state or -country, remember to give yourself ample time to complete the downsizing process. You will want to ensure that you have carefully weighed all of your housing options and that you are moving into a home that will meet all of your wants and needs. Adequate planning and preparation can help you to avoid the stress associated with downsizing.

**Summary Activity:**
Remind participants of the importance of keeping an end goal in mind. Ask participants to quickly reflect on what they learned about the downsizing process. Quickly review the steps of the downsizing process: identify a housing option, sort through possessions and prepare to move into the new home. Challenge the participants to remember what they have identified as important as they move forward with the downsizing process.

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