

A photograph of a room during a moving process. Several cardboard boxes of various sizes are stacked in the foreground and middle ground. One box is open, showing packing materials and a colorful ball. A woven basket sits on top of one of the boxes. In the background, a window with decorative stained glass panes looks out onto lush green trees. The room has light-colored walls and a wooden floor.

**The Downsizing,
Rightsizing, and
Moving Process:**

Tips to Make it Simple



Moving from one's home to a smaller one is never an easy decision. But just as difficult is the process of parting with a lifetime of possessions.

BY CINDY HOFEN

No matter our age, the thought of rightsizing, organizing, or moving makes most of us want to take a nap. This is a common reaction—getting organized is not a skill that comes naturally to most people.

Some people move because they want to, but the majority of older adults move because they have to. And after living in their homes for thirty or more years, they are often surprised at how much “stuff” they have. They wonder how it all got there and why they kept it. Sometime all the stuff can be a major obstacle that keeps them from moving forward.

Traditionally, the dispersal of items has been referred to as *downsizing*. But this can have a negative connotation, especially because it is associated with the business world where downsizing is bad news. A newer term, which better captures the process older adults face, is *rightsizing*. This is defined as undergoing a reduction to an optimal size, simplifying your surroundings, while keeping what matters most at this phase of your life. For clients, this means reducing possessions to an optimal amount.

By thinking about what they want to do, what interests them, and the lifestyle they want going forward, older adults can more clearly make decisions about keeping the things that support their vision, and letting go of the things that don't. When getting started and throughout the process, professionals have found the following tips and suggestions to be helpful in coaching their clients through the process.

1. Create a plan. Having a plan helps them stay focused, which makes the process go more smoothly and helps reduce stress. Encourage them to use a calendar to determine key dates, then working backwards, adding all the “To Do's.”
2. As clients begin sorting and trying to decide what to keep, suggest they think about:
 - “What do I need?” Focus on the basics here—furniture, decor, clothes, bedding, dishes, toiletries (that are not outdated!), and so on.
 - “What do I love?” They may have a collection of twenty items, so how about keeping two or three?
 - “What do I want?” Is there space for it in their more organized, (usually) smaller new home?

Note: Sometimes, when clients or their families become overwhelmed with the amount of items they

have, and can't or don't want to make a decision about where they go, they consider renting a storage unit. This can be helpful short-term, but for most people, they are “kicking the can down the road”. Consider the annual cost of a storage unit relative to the actual value of the items stored. Over a period of years, rent would amount to thousands of dollars to store items that potentially will have little value or no one will want.

3. Commit to scheduling time every day and be disciplined about sticking to it. Set a timer for fifteen minutes. Some clients find that once they get started, they are motivated to continue working.
4. Set manageable goals and go for small changes first! Suggest selecting tasks that don't seem daunting. Cleaning out one drawer a day (maybe that junk drawer full of rubber bands, twist ties, old coupons) can make a big difference over the course of several weeks. Or start in the room they use least, to help fine-tune their sorting skills.
5. Create a staging area for items designated for donations, family, or friends. The garage is ideal for this purpose. Clearing out the garage first will give them ample space to sort, and will start getting things out of the house. When they are ready, they can arrange to have them dispersed.

Note: Always suggest black plastic bags for donations, so they won't be tempted to pull things out, “just in case” they might need them after all.

6. Paperwork. For those who have filing cabinets, suggest they sort one drawer at a time and keep only what they really need. They can call a shredding company that will come to their home if they have a lot of documents needing disposal.

Note: Suggest that clients to go online to find what paperwork should be kept or tossed. Consumer Reports has a list at <http://www.consumerreports.org/cro/2010/03/conquer-the-paper-piles/index.htm>. Direct them to talk with their accountants or lawyers if they have specific questions about what to keep.

Dispersing the Rest

The great majority of people find the most difficult aspect of rightsizing to be the “dispersal” part—what to do with the items they don't keep. Setting proper expectations up front about what to expect can make a big difference as they move through the process. While many things may still be useful, most aren't of

high value. If you ask clients if they bought the furnishings and decor in their home as investments, most will agree they did not, which will give them a better perspective when setting expectations about selling things. The reason the resale market is soft is a reflection of the following trends:

- More and more people are downsizing, not just older adults, and the volume of donations is increasing. Even charities like Goodwill and Salvation Army have become more selective about what they will take.
- Most adult children do not want much from their parents because they already have a house full of their own belongings.
- Styles have changed, and large brown furniture is no longer popular. Antique furniture is not as desirable or valuable as it once was in many parts of the country. Buyers are looking for furniture with a smaller scale and cleaner lines, and tend to favor stores such as Crate and Barrel and Pottery Barn.

When clients want to know how much their things are worth, the best answer is usually, “Your items are worth what someone else is willing to pay for them,” regardless of how much they originally cost.

The following dispersal process can be very effective in helping clients with their decision making.

Family, friends, and others. This is always the first step and the best way to know their things are going to good homes. Local movers can arrange for delivery, and companies like UPS can handle small shipments out of the area.

Auction. This may be an option for higher-end items including jewelry, fine art, sterling silver, high-end designer furniture, and some collectibles. Most auction houses offer a free evaluation via the Internet, and some have complimentary appraisal events where clients can bring in items for evaluation. Commissions vary by auction house (the value of items is only guesstimated by the auction house—they cannot determine final value). Ultimately, the final price is determined by the buyers and may sell below expectations. Researching items on eBay is a great way to determine current value.

Estate sale. If clients have a large quantity and a wide range of items with some value, an estate sale might be a good option. Finding a reputable company is important to ensure a good outcome. Make sure clients ask for and talk to references, and that the company is properly licensed and insured.

Following are examples of questions to ask when

interviewing estate sale companies:

- Is there enough here to do an estate sale, and when do you have room on your calendar?
- How long will the process take from start to finish?
- How does your company determine value, especially of high-value items?
- What if I change my mind and want to retain a few items after we have signed a contract?
- What exactly do your fees cover? Are there any other costs such as set up and sales fees, credit card processing fees, pre- or post-estate sale debris removal fees.
- Does your company provide an inventory of all items sold, and how long does it take for your company to settle its accounts and send a check to the estate?

Garage sale. Garage sales are a lot of work, often with a low return on investment. However, some families find it fun to do together.

Consignment. This is an option for good quality and marketable furniture in good condition (all determined by the consignment store). Clients can email photos or schedule an in-home appointment if they have many items. Items can be dropped off, or picked up for a fee. Usually they receive 50 percent of the selling price. Because the number of items coming on the market continues to increase, consignment stores have become more selective.

Charitable donations. Information is available online about specific charities and what they will accept. There are places to donate just about anything. Be sure to get a receipt for donations. If there is a lot to donate, some charities will pick them up, but it may take a week or two depending on how busy they are. When donating, assure clients that someone else will be able to use the things that no longer fit into their lives.

When trying to decide whether to consign or donate items, it’s important to know how the numbers add up.

CONSIGNMENT EXAMPLE:

- Item(s) with a current market valuation of \$400
- Less 50 percent consignment fee of \$200

- Less \$75 average transport fee charged by most consignment centers
- **Total = \$125**

Stores reserve the right to reduce the price of items in order to make a sale. If the items don't sell within a specified time, they may have the option to reduce the price or ultimately donate them.

DONATION EXAMPLE:

- Item(s) with a current market valuation of \$400
- Assuming 25 percent tax rate
- **Save \$100+ on tax bill**

Craigslist. Craigslist requires taking photos, uploading them with a description, and monitoring responses. Potential buyers might call for information and usually come to the home to view the item(s).

eBay. Almost anything can be sold on eBay. Clients can do this themselves by creating an account, uploading photos, monitoring the posting, then shipping the items if and when they sell. There are eBay resellers who will list and ship items most often at a 30–50 percent commission, and may pickup depending on the items. Check online for companies in your area.

Clear out. For items that are not in good enough condition to sell or even donate, check with local trash collection services. They will sometimes do bulk pickups at no charge, and most rent dumpsters if that is appropriate. Local, independent companies can also help with item removal. Most cities offer programs that can help find the right recycling resource. Please dispose of hazardous materials—paint, weed killers, solvents, prescription drugs—safely. Be sure to get specific instructions for your area.

Books. If you think some have value, call or take to a local bookseller. You can also donate to the local library, which sells books for fundraising.

Photos. Many services will digitize photos and movies. While going through pictures, keep only the ones that are most meaningful and interesting. Ask friends and family what they would like to keep. If no one wants them, storing them in a closet or under the bed takes up valuable space leaving less room for the things you need, love, or want.

China and crystal. There is not a strong market for these types of items because entertaining is less formal than in the past. Check with local antique shops or on eBay.

Pianos. If the client has a Grand Piano, or other high quality well-known brand, it may be marketable. Smaller and/or older upright pianos can be difficult. Check with churches, music schools, or community centers to see if they are interested. Often you will have to pay moving charges. Listing for free on Craigslist can also be an option.

Designer clothes and shoes. They will need to be current, clean and in excellent condition. Search the Internet for local resale shops. They typically offer a fifty-fifty split. There are also companies on the Internet that specialize in resale of high end designer items.

Furs. Not much market in the U.S. You may be able to sell on eBay.

If you wonder what an item is worth, check eBay. Do a search for your item, then look at the lefthand blue column at the bottom where it says “Show Only,” then check the box for “Completed Listings.” This will show which items sold, what they sold for, and which did not sell. Note how many items like yours are for sale.

To give things away for free, try the following:

1. Put items in front of the house with a “Free” sign.
2. Put an ad on Craigslist for “Free Items,” and include the day and hours they will be available.
3. Use www.freecycle.org.
4. Consider church and community rummage sales.
5. Invite friends and family for a giveaway party.

Finally, remember that it took time for “clutter” to accumulate, and it will take time to disperse. Encourage your clients to go easy on themselves. As they begin dispersing items and the volume is reduced, they will start feeling less stressed and more peaceful.

A favorite quote from Eleanor Roosevelt: “Today is the oldest you’ve ever been and the youngest you’ll ever be.”

So get started today, and remember: **Less is more!** •CSA



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