

Downsizing Opportunities Evaluation Tool

Helping families identify where a home still supports — or limits — daily life.

Instructions

Walk through each space in your parent's home and use this checklist to reflect on whether the space fits their current needs and lifestyle.

Check any boxes that describe the situation. Add notes for areas that may present downsizing opportunities.

1. Living Areas

Category	Considerations	Observations / Opportunities
☐ Underused space	Large rooms or formal areas rarely used	
☐ Difficult to maintain	Furniture, floors, or décor that require constant upkeep	
☐ Safety concerns	Cluttered pathways, heavy furniture, or low lighting	
☐ Emotional attachment	Items or furniture kept mainly for memories	

2. Kitchen & Dining

Category	Considerations	Notes
☐ Frequency of use	Are all appliances or storage areas being used regularly?	
☐ Maintenance effort	Hard-to-reach cabinets, cleaning difficulty, unused dining areas	

☐ Social use	Is the space still used for gatherings or daily meals?
☐ Downsizing potential	Could a smaller or simpler setup meet their needs?

3. Bedrooms

Category	Considerations	Notes
☐ Extra rooms	Are there guest rooms rarely used or filled with storage?	
☐ Accessibility	Is the main bedroom on a safe, accessible level?	
☐ Comfort	Does the space feel restful and easy to manage?	
☐ Sentimental items	Belongings that may need careful sorting or donation	

4. Bathrooms

Category	Considerations	Notes
☐ Safety	Non-slip surfaces, grab bars, lighting	
☐ Accessibility	Walk-in shower or tub access	
☐ Space use	Are there underused bathrooms requiring maintenance?	
☐ Modernization	Could updates improve safety and ease?	

5. Yard, Garage, and Outdoor Areas

Category	Considerations	Notes
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☐ Maintenance load	Lawn, garden, or exterior work that requires physical effort
☐ Frequency of use	Is the outdoor space enjoyed or mostly maintained?
☐ Safety	Uneven ground, stairs, poor lighting
☐ Storage overflow	Excess tools, furniture, or unused items

6. Overall Home Fit

Category	Considerations	Notes
☐ Emotional connection	What makes this home feel meaningful or “hard to leave”?	
☐ Lifestyle alignment	Does the home match current hobbies, health, and energy levels?	
☐ Social connection	Is the location convenient for friends, family, or community?	
☐ Future needs	Could this home adapt to changing mobility or care needs?	

Reflection

Based on what you’ve observed, which areas of the home may no longer fit your parent’s daily life?

Which spaces or belongings could represent meaningful downsizing opportunities?

What would make the next living situation feel *just right* — safe, comfortable, and aligned with who they are today?