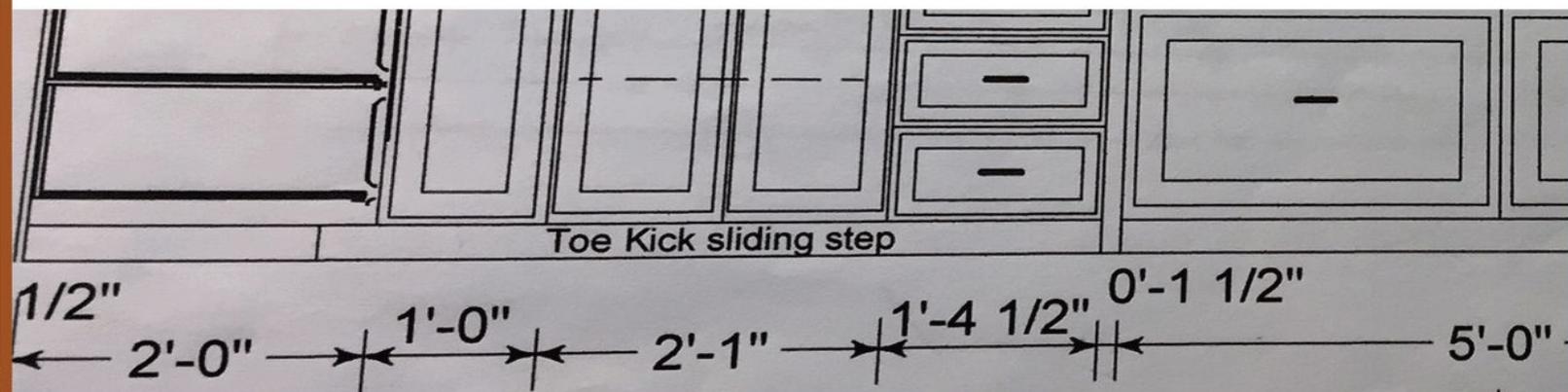


# DOWNSIZING PLANNING WORKBOOK



Grace BERMUDEZ.com

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# Introduction

Downsizing usually means you will be living in less space. Not always though. Your new home could have the same or more square footage, but you have decided you want to downsize your stuff. This rightsizing often comes with a lifestyle change as well. For the first time, you may be able to walk to restaurants, you may no longer need your car, you may choose a more rural setting. Will you be moving closer to family or friends? Living in multiple places throughout the year? Maybe you would like space to work from home, start a new business, space to paint, or store your kayaks.

Is this the first time you ever considered how you really want to use your space? If you are sharing your new space with a significant other, ask them to think about what they want and need as well. This workbook will walk you through the same questions I ask my clients, guiding you through those tough downsizing decisions. Start by printing out a copy of this workbook. If you do not want to copy certain pages that you don't need, that is OK too. Putting it on a clipboard can keep it handy and give you a surface to write on. If you love coffee or tea, grab a cup, relax, and take the time to imagine and consider what you really want and need. Fill in the blanks. If things don't apply to your situation, just skip over them. Put important dates on your calendar. Near the end of the workbook are 10 of my best organizing Tips that apply to downsizing. I don't want you to sit with this workbook and be stuck. Reach out to me via my website [www.GraceBermudes.com](http://www.GraceBermudes.com) or my facebook group [www.facebook.com/groups/YourAwesomeOrganizedHome/](https://www.facebook.com/groups/YourAwesomeOrganizedHome/)

Let's make downsizing and organizing happen! I want you to get it done!

# Downsizing Planning Workbook

## Step 1 Before You Begin

New Address:

Date of Move:

Square footage of new place: \_\_\_\_\_ Bedrooms:      Bathrooms:

List other spaces:

Moving Company info:

Donation drop off hours:

**Check off as you complete: (add detailed notes of what, when, date etc.)**

**address forwarding or PO Box** \_\_\_\_\_

**shut off gas, propane, electricity, phone, garbage, etc.** \_\_\_\_\_

**stop services (gardener/deliveries/housekeeper/internet/phone etc.)**  
\_\_\_\_\_

**Pick up dates (recycle, donations etc.)** \_\_\_\_\_

**Turn on gas, propane, electricity, phone, garbage, etc.** \_\_\_\_\_

**Hire gardeners, housekeepers, etc.** \_\_\_\_\_

Additional Notes:

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Assemble Tool Boxes



**Tool Box 1 (basic tools)**

- Hammer
- Assorted box of picture hanging hardware and wire
- Assorted Phillips and Flathead screwdrivers
- Measuring tape (at least 25')
- Wire cutters
- Pliers
- Needle nose pliers
- Small level (about 8")
- Heavy duty scissors
- Paint brush
- All-purpose glue
- Razor blades
- Sharpie Pens
- Pencil



## **Tool Box 2 (office supplies)**

- Scotch Tape
- Stapler and extra staples
- Staple puller
- Scissors
- Measuring tape (about 10')
- Sharpie Pens
- Pens and Pencils (At least 4 as they tend to disappear easily)
- Clear file folder tabs with inserts (easier to read)
- Assorted labels (i.e., 1 1/2" x 3", 2" x 4")
- Rubber bands
- Paper Clips
- Asst. Binder Clips
- Post-it Notes (Three Colors)
- Industrial Post-It Notes

## **Extra Items**

- Low stool for sitting on
- Step ladder for reaching top shelves

Choose an out of the way area where you can collect loose papers, sort small items, keep your tool boxes and packaging materials. I call this a staging area. By always returning these items to one consistent space, you will always know where they are when you need them, even when things are being moved around in other areas of the house. Dining rooms work well for this purpose. A large table set up in a garage, or unused bedroom could work also. Label 4 boxes or bags Donation, Recycle, Shred. and Trash, so you have them handy to use here.

Staging area

## Step 2 Develop Your Plan

**First** think about and answer this question:

Which types of activities do you want to make room for in your new spaces?

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**Next**, take a brief walk around your current home. Use the pages titled “**Donations and No Longer Needed**” and “**Move to your New Home or to Another Room in your Current Home**” List the large items in your home and their destinations. This will give you the opportunity to keep track of what is going where. Additionally, choose a different color sticky note for each item type. For example: Donations use Blue sticky, Moving use Yellow sticky. Add the destination (ie: charity, relative, room, etc.) where the item will end up on the sticky as well.

**Next**, print out one “**Room by Room**” Worksheet on a separate page for each room in your new home if you are moving or existing home if you are repurposing your existing home. List each room/space on its own worksheet. Answer the questions about size and uses. If you have a particular date when the movers will arrive, a roommate is moving in, or you’ve set the date for a party, write that date down. If a room has no purpose(s), consider that an opportunity. Look at your list of activities/things you would like to make room for. Perhaps it can work for that.

For each room fill in the name of the room and use



### **Step 3 Sorting and Organizing**

Think about what will be stored there, and how would you like to store it. Fill in types of containers and organizational products needed. This includes things like types of hangers you want. Don't forget to take measurements of the areas where your containers, shelves, etc. will go, so you will be sure they fit.

### **Step 4 Refresh Your New Place with Style**

Go through the checklist and check off those things that are important to improve the look, feel, and function of that room.

How do you want the Room/Area to look?

### **Step 5 Unpacking & Organizing into Your New Home**

Putting everything in its place. This is the FUN Part!

If you packed things up in an organized fashion during the sorting phase, it should be quite easy to unpack and put in place. If your movers created chaos, have lots of different size containers ready to organize things into as you unpack. I have found that it is easier to purchase more containers in different sizes than you think you need, so you have some extras on hand. Before you buy, check return policies. Keep all receipts/wrappings from containers and organizing supplies until project is complete (you may need to return or exchange for different sizes/colors/shapes).

A little rant about "for now"-

When making decisions where to put things, do not say I am putting it here "for now". You can always move things later, but as you unpack choose a place that makes sense and put it there. It's a little bit of difference, but making decisions puts you in charge. If you say "for now" you will end up with countertop piles of "for now" which are delayed decisions, usually are not thought through, and since you will have to move them again for sure, you end up with twice the work.





## Room by Room Worksheet

Room/Space to organize:

Organized by: \_\_\_/\_\_\_/\_\_\_

Size of Room:

What is the primary use for this room?

What activities will you do here?

What will be stored here? How would you like to store it?

Check all problems that apply:

- Room has no purpose
- unused space- Where? \_\_\_\_\_ Could be used for \_\_\_\_\_
- inefficient layout- The problem is? \_\_\_\_\_
- inefficient storage containers (ie: too big or small, wrong shape, broken, not right) \_\_\_\_\_
- things that should NOT be stored there are
- poor accessibility (ie: the seldom used are front & center, too high/low)
- Not organized the way you like to use it
- The look is dated or just not to you
- Ghastly paint color- (new paint color)
- Poor lighting
- Needs window coverings
- Needs shelving or cabinetry
- Repairs needed – List \_\_\_\_\_



Organizing is a process, it is not one and done. Even I get behind on things, you pour your energy and time into other things, sometimes it is raising your kids, sometimes recovering from an illness or surgery, sometimes caring for somebody else, focused on starting a new business, graduating from college, writing a book. The problem is when you get too far behind it is easy to get completely overwhelmed by organizing. The amount of disorganization that causes the overwhelm doesn't have to be that much, it's very personal. This is the most common thing I see when people contact me to get organized. The amount of disorganization has just gotten beyond their personal overwhelm level and they can't imagine getting it organized. I don't want you to have this workbook and not getting anything done. Let's make it happen!

**If you get a bit stuck or have a question, you can contact me anytime through my website at [www.GraceBermudes.com](http://www.GraceBermudes.com).** Or join me in my facebook group

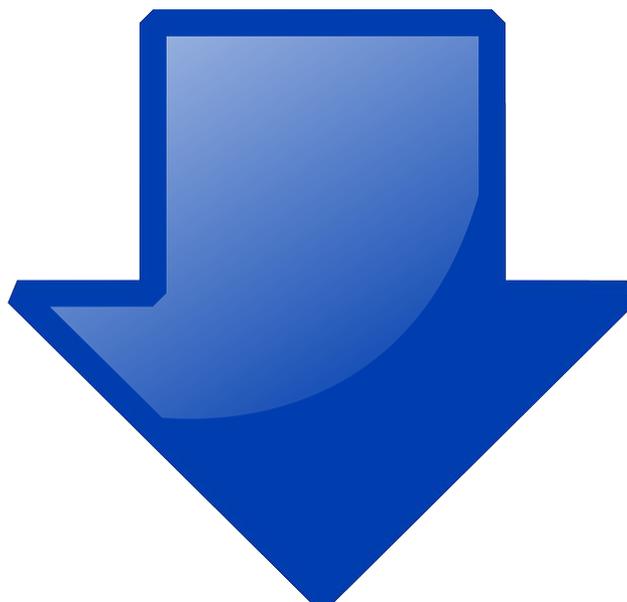
[www.facebook.com/groups/YourAwesomeOrganizedHome/](https://www.facebook.com/groups/YourAwesomeOrganizedHome/)

It's a group that I started that's all about organizing and making your home beautiful!

If you decide that you don't want to do the organizing, you find organizing overwhelming, organizing isn't in your wheelhouse, or if it just isn't the highest and best use of your time, hire a professional organizer like me.

**You can contact me anytime through my website at [www.GraceBermudes.com](http://www.GraceBermudes.com) or text me at 408-202-4272** Let's have a conversation and find out how I can help You.

I hope you enjoy my 10 Bonus Organizing Tips.



# 10 Bonus Organizing Tips

## *More Solutions to Common Organizing problems*



1. **Cords everywhere** – There isn't any accessory that distracts from the look of a room more than a jumble of cords! Corral them with rubber bands, baskets, hooks, or Velcro. If you have a very modern office desk, you can hide cords by using Velcro to run the cord up the desk leg and across the back where it won't be so visible. You can also purchase cord channels to hide cords running along a baseboard or wall. These are available in most hardware stores and online.



2. **Containers that are difficult to use** – Unfortunately just because they look good doesn't mean they will work well. Choose containers that are sturdy and easy to open and close. Only use top opening lids if you are not going to pile anything on top of it.



3. **Items that are inconveniently placed** -- Keep more frequently used items to the front or middle area where it is easy to access and easy to put away. You know those deep and/or awkward cabinets? There are a lot of pull out shelving units that can be used in those. Most of these need to be professionally installed, but in my opinion worth looking into for those difficult areas. Being able to access everything without having to reach over or around is absolutely wonderful!



4. **Underutilized spaces** – The fastest way to identify more space is to just look up. These spaces work great for lightweight items like extra pillows, seasonal decorations, seldom worn hats, and Memorabilia. When using high shelving, think about when and how you would access it. Use step stools that have wide sturdy shelves and a handle to hold on. If it is not safe for you to climb, do NOT climb, hire someone to retrieve things for you



5. **Wimpy storage** – Saggy shelves and hooks that don't stay on the wall are not only unsightly, but they can be dangerous if they fall. Make sure that all shelves are adequately supported. You may have to hire a handyman to put in some more supports. There are screw in hooks and stick up hooks. I find "Command" brand stick up hooks work well if you pay attention to the weight limits. I tend to use hooks with higher weight limits than I need for extra durability. If you live in a very humid or moist area, you may want to stick with the screw in type.



6. **Simplify and Categorize your filing system** – I prefer hanging files in a file cabinet. Neat, out of sight, and easy to access. Rather than filing alphabetically, try using main categories such as Insurance, Investments, Vehicles, and Credit Cards listed by last 4 digits. A lot easier to find things. If paper is a problem for you, go to my website. I wrote an e-book called "Organize Your way out of Paper overwhelm in 7 steps" all about organizing paper.



7. **Storing things for others** – This happens to many of us. Kids move out and leave behind all sorts of things. Family members ask if you can store some furniture while they are spending a year abroad. Five years later you still have it.

- Be realistic about what you can and cannot store.
- Moving things into offsite storage can be an expensive option.
- Send a cell phone photo and tell them that you are downsizing/moving and item will need to be picked up by give a date.
- You can also volunteer to donate the item.



8. **Books, Books, Books** – I mentioned in “The Secret Sauce of Downsizing” that libraries are good places to donate used books. Other places include used bookstores, senior centers, and donation centers. If you have books you are storing for someone else and want to send them, send them media rate. It’s less expensive. Then we have the books nobody wants. Sadly, the majority of 35 year old college textbooks fit into this category. Even most of the newer ones are so “VALUABLE” the college bookstores won’t even buy them back! Sometimes if you are lucky, they might give you \$1. Old magazines and old Tech books also tend to fall into the “nobody wants category”. The good news is most are made of paper and can be recycled.



9. **Add more lighting to storage spaces** – It is so annoying to be in a closet and not be able to see what you are looking for. Sometimes putting a brighter bulb in the area outside the closet may help if the closet isn't too deep. You can hire an electrician to put in a fixture, but if this is not an option, there are a lot of stick up battery-operated options out there.



10. **Start a Design File** – Looking for a fun way to focus in on giving your home a new look? As you are looking through your magazines, rip out the photos you love. Note on the page what it is you love. Could be furniture, draperies, color, rug, kitchen, etc. Put in a folder. I make a separate folder for each area: kitchen, living room, bathroom, etc. You probably will see some similarities between the pictures and begin to see your style. If you work with a designer you can show them things you like.

I hope you all will join me in my facebook group

[www.facebook.com/groups/YourAwesomeOrganizedHome/](http://www.facebook.com/groups/YourAwesomeOrganizedHome/)

It's a place to start getting those downsizing and organizing questions answered.

## About the Author



Grace graduated with honors from San Jose State University with a B.A. in Environmental Studies and a Teaching Credential. While raising 4 kids, Grace was inspired to launch her professional organizing business, Check It Off Your List. Since 2007, she has organized everything from homes, offices, garages and classrooms to barns. She has even helped in the design and construction of new homes and remodels (including a Lake House that is expected to be finished in 2020).

Her definition of the word “Organized” appears in the International Best-Selling book, *Itty Bitty Book of Words*. Her unique approach to organizing is why clients across the nation work with her.