



# Futuring with Downsizers

A Framework for Working *with* Transitions

A thesis document by Lisa Otto  
submitted to the School of Design,  
Carnegie Mellon University, for the degree of  
Master of Design in Design for Interactions

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## ABSTRACT

The issue of downsizing is becoming more prevalent as the population ages. While most people consider the process to be about reducing the number of possessions and space, for many downsizers the process, at its core, is about matching their space and possessions with their changing lifestyle. With children out of the home and health changes on the horizon, downsizers are considering how their homes can support their changing lives.

Existing tools around the downsizing process focus on helping downsizers pare down their possessions more quickly and efficiently. They don't consider the downsizing process as a moment to explore possible futures. However, this moment is ripe for futuring as downsizers try to match their things, environment, and practices with their changing circumstances.

My thesis involved secondary research focused on practice-oriented design as well primary research with a small group of downsizers who were in the process of downsizing. The culmination of the thesis is a self-guided toolkit for downsizers that provides a framework for thinking through challenging choices that they encounter during the process. The toolkit provides methods for thinking more expansively about the process.

# ACKNOWLEDGMENTS

*I am very thankful to my thesis advisor Molly for our many conversations and for the trust required for me to take my thesis in unexpected directions.*

*I am also very thankful to my husband Scott, who listened with neverending patience as I worked through my thesis frustrations with him (and for correcting my numerous typos).*

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# Introduction

“...moving in is never finished or complete, but rather is an ongoing state of inhabitation, a process of accommodating to material configurations through habitation.” (Gregson, 2007, p. 35)

As the American population ages, the issue of downsizing one's home is becoming more prevalent. Like any major life transition, downsizing is stressful. While most people consider the process to be about reducing the number of possessions and space, for many downsizers the process, at its core, is about matching their space and possessions with their changing lifestyle. With children out of the home and health changes on the horizon, downsizers are considering how changing the size of their homes can support their changing lives.

Downsizing is a notoriously tricky topic to study because of the various definitions, influencing factors, and methodologies for measuring the trend (Sergeant et al., 2008). I define downsizing as moving into a smaller home with reduced possessions but, for the most part, I let my participants self-identify and define downsizing as they find relevant to their particular contexts. I focused my research on downsizers 50 and older, given the culturally-held belief that this is a popular time for downsizing. Studies do seem to find that downsizing in the over-50 population has a steady and consistent presence (Painter & Lee, 2009) (Banks et al., 2010). Even articles that claim to demonstrate the opposite reaffirm the presence of downsizing as a consideration of aging. Although Nielsen, a company which conducts consumer research and surveys, published a summary of interviews conducted around 2015 under the headline “Uncommon Sense: Most Baby Boomers are Not Downsizing (Quite

the Contrary),” they found similar results to previous studies. Roughly one-third of Boomers reported that they planned to move and slightly more than half (54%) of those planned to downsize (Burbank and Keely, 2015).

Many existing tools focus on getting downsizers through the sorting and inventorying process as quickly and efficiently as possible (see Olson, 2014) or after choices of what to get rid of and what to keep have already been made (see Einsenberg, 2017). However, this fails to recognize the downsizing process as a time at which people are reassessing and considering their habits and values and how they match with their things. The downsizing process is an opportunity to support downsizers in thinking through the structure of their habits.

Designers have been increasingly interested in thinking about how their work influences not just products and services but also people's habits. Practice-oriented design, an approach to changing practices rather than behaviors (Kuijer & Bakker, 2015), for example, has begun to develop methods around living labs and trialing to support long-lasting changes in lifestyle. However, designers considering practice shifting often work for transition rather than with periods of transition like downsizing. Developing futuring methods is a key element of the practice-shifting process which practice-oriented design has yet to marry into the process. In opening future possibilities, downsizers can recognize an expanded range of futures and, ideally, engage in dialogue with other people and their range of possibilities.

For this thesis, I used downsizing as a case study for how designers can develop methods to work with groups already engaged in transition to support futuring for shifting practices. I completed a literature review on the methods being developed by practice-oriented designers. In total, I worked with 8 downsizers who were either beginning or had recently completed the downsizing process. I conducted interviews, a cultural probe, and prototype workshop with participants. Finally, I developed a self-guided toolkit for downsizers to expand their concept of possibilities around the downsizing process. The toolkit provides futuring methods for thinking more expansively about the process.

# Literature Review

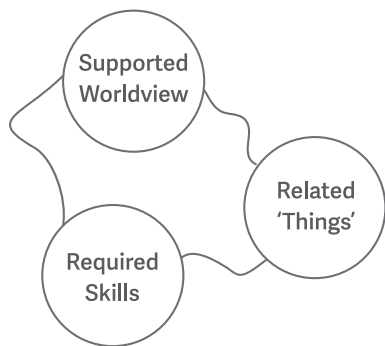
“Whereas the conventional design process focuses on products and services as the final outcome, a practice-orientation redefines the role of products and services as means to another end. However, that end is no end at all, but rather a process of change—change in practices.”

(Scott et al., 2012, p. 284)

## CHANGING BEHAVIOR

Designers are increasingly interested not just in products and services but also their role in shaping habits and routines. However, some designers are skeptical of the behavior change methodology that builds in nudges, rewards, and restrictions into products and services. Kuijer and Bakker (2015) write that traditional behavior change methods have “(1) a focus on incremental savings that tend to disappear in larger trends, (2) a risk of failing to achieve the intended behaviour change, (3) a strong rhetoric of right and wrong behaviours and (4) a risk to miss opportunities on larger scales of change” (p. 3). These methods do not think holistically about the networked system in which behaviors and products reside.

Instead, some designers have begun to adapt social practice theory into their design process. Social practice theory is framework from sociology that takes practices “as the fundamental and smallest unit of social analysis” (Kuijer & Bakker, 2015, p. 8). Adapting social practice theory into design requires moving from focusing on individual user-product interactions to focusing on practices. Practices are not singular moments of interactions but are developed and maintained over time through repetition. Practices are a



**Figure 1.** Adapted Stuff-Image-Skill model of practices from Scott et al., (2012, p.283).

combination of skill, worldview, and the related objects (see Figure 1). In order to shift behavior, practice-oriented designers work within this conceptualization of habits.

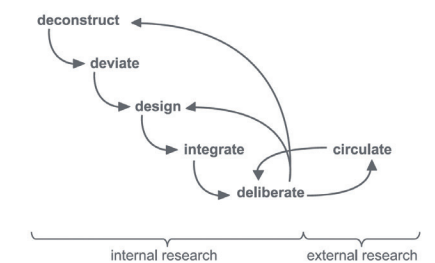
## CHANGING DESIGNERS' METHODS

This reconceptualization of the object of design also requires a shift in the processes and methods of design. The conventional design process still maintains a division between the end user, research participant, and the designer (Kjærsgaard & Otto, 2012). Even in participatory design, which “utilize[s] the skill-based but often tacit knowledge of users about their own (work) practices directly in the design process in order to create more appropriate and democratic technological solutions for the user,” the designer will still synthesize these findings independently (Kjærsgaard & Otto, 2012, p. 79). Under these frameworks, participants are engaged in the research process, but only in that they will provide information and insights for the designer to incorporate into a final design, service, or strategy. However, with practice-oriented design, designers have begun to acknowledge that design can play a role in creating shifts in perception and routine which itself can be the outcome of a design process.

Shove (2007), a key figure in practice-oriented design, describes how, in the shift from product-oriented design to human-centered design, the understanding of values is reconceived. She writes that “rather than a design(er) led process in which products are imbued with values for consumers to discover and respond to, proponents of this more radical form of user-centred design argue that traffic flows both ways” (Shove, 2007, p. 133). In practice-oriented design, this is taken a step further. User needs are not innate and discoverable through design research but instead are formed as people engage in a routine, practice or even a design workshop (Scott, 2011). While in participatory design, the end user has a more active engagement in the design workshops to determine and create the final result, in a practice-oriented reframing, engaging in a design workshop shapes one’s needs as much as it reveals one’s needs.

The desired outcome for the process moves from a product, service, or strategy to a shift in practice. For example, designers who have begun to explore the implications of practice-oriented design with an eye toward sustainability often have reduced water consumption as their desired outcome (Scott et al., 2011; Kuijer, 2014). Because the outcome is not a product, service, or strategy, but rather a change of practice or routine, workshops that would have been exclusively intended for research gathering become sites of exploration. These researchers have employed methods like living labs where participants, rather than designers, are able to reexamine their existing habits and trial new ones. These workshops and experiments “apply the social methods of disruption to everyday routines in order to render visible the objects and settings of everyday life” to the participants rather than the researchers (Marres, 2012, p. 79). In other words, through these experiments, participants trial alternative lifestyles.

Scott et al. argue that creating space for both reflective and active exploration of a habit change is integral to the process (Scott et al., 2012, p. 285). In *Designing Change by Living Change*, Scott et al. provide a model for structuring a facilitated bounded trial (Scott et al., 2012,) (see Figure 2). This model could be built off of to develop an experimentation model to be used around downsizing. In Scott et al.’s model, participants first deconstruct their existing practices and then select a way to deviate from those existing practices. Since Scott et al. were exploring bathing practices, these deviations might involve water consumption reduction goals. These new deviations often require new things and environments and so participants will co-design support structures for these practice changes. For example, Scott et al. describe participants designing alternative knobs for showering. Then these designs are integrated into practice within existing practice contexts. Finally, participants reconvene to assess the success of the new practices/things/environments and either circulate or return to deconstruct them again.



**Figure 2.** A generalized methodology for practice-oriented design by Scott et al. (2012, p. 286).

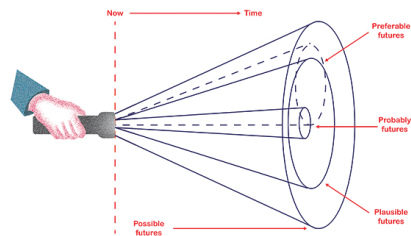


Figure 3. Futures cone depicting the spectrum of futures by Bland, J. (2016, January 7).

## DESIGNING FOR FUTURING

While practice-oriented methods provide the mechanism for exploring and enacting shifts in routine, they assume a participant who already has a mindset toward an open framing of the space. These researchers reconsider the role of the participant, but they assume the participant is already in tune with the intentions of the workshop. But this is not necessarily the case. Participants may not yet be open to different ways of living. The role for the designer in practice-oriented design is not simply to facilitate the workshops where participants trial new practices. Designers must also foster a mindset to open new possibilities so that participants are willing to engage in these trials. In other words, designers must foster participants' ability to see a broad spectrum of futures, not just those that are probable (see Figure 3).

In Scott et al.'s (2011) model for practice-oriented design, futures are first opened up and then closed, as the participant selects and trials an alternative practice. They refer to this as a "continuous alternation between discursive and practical modes" (Scott et al., 2011, p. 7). The living lab provides a model for the practical mode, but there are fewer precedents for the discursive mode — perhaps because as designers we are most interested in diving into the doing. Nevertheless, without first opening up possibilities through the discursive mode, the exploration will not stray from the present reality.

## WORKING WITH TRANSITION

Scott et al.'s model works to encourage people to transition to a new habit or behavior. However, this does not address people already engaged in a transition who could use support through this transition. Designers do not have many models for thinking about people in transition. Instead, designers typically focus on the type of person they are designing for as a static entity. Personas, for example, are a common way to exemplify the type of person who would use a product or service. While the persona may take into account life

phase, it does not have a way to consider these moments of practice shift.

Shove provides both a model for why we change the objects we surround ourselves with as well as a good argument for developing a model to work in transition. Although we often think of people as constantly craving the new, Shove argues that we instead attempt to maintain consistency as best as we can in our lives. For the most part, we want a new thing not for the thing itself but because we envision ourselves engaging in a new practice (or in the same practice in a new way) that requires that thing. For example, Shove writes that kitchen renovators "...are constrained by kitchen arrangements that embody past understandings of home and family life" and desire upgrades to realize their visions of practices, like eating dinner together rather than in front of the TV (Shove, 2007, p. 29). Most of the time, these shifts in practices are small. We buy a new fitness tracking watch to encourage more walking and become healthier or a new lamp so that we can read in the living room after dusk and become more well-read. However, when our circumstances change on a greater scale during times of transition like downsizing, we realize that many of our practices do not match our new vision for them. When we have a major change in our practices, this opens up the opportunity for many more practices to change.

Getting people to change established habits is incredibly hard. Working in transition provides an opportunity to work with people whose habits are already in flux and who are more open to shifts in habits.

## WHY DOWNSIZING?

Life transitions are a rich time in which to work because typically static routines and practices shift. Change in enough practices opens the entire fabric of networked practices to shift (Shove, 2012). During the process of inventorying and sorting, downsizers are very directly considering their things as well as their practices. This creates a window of opportunity to enable downsizers to reflect on how they

are shifting their practices. Once they have completed their downsize, the window of opportunity will have closed and downsizers will re-establish a new network of things and practice patterns. These practices will be less susceptible to change.

With downsizing, the mismatch between practices and values and home and possessions can manifest in a variety of ways. For many who downsize at retirement age, after their children have left the home, they discover a mismatch between the amount of space and things they have and what is actually being used. Some might look even further into the future and consider upcoming health concerns and realize that there is a mismatch between the way their home is configured or the things they use and what they will be able to use.

The time before downsizers move is a moment in which they have additional freedom to reinvestigate the way things shape our behavior. In design we often talk about how these things (for example, an air conditioner) have affordances which suggest that we can perform certain actions with or on them. However, Verbeek has a stronger concept of how we relate to things. Things mediate our perception of reality and script us to perform certain actions. It is not just that the air conditioning unit allows us to turn it on when it gets hotter than 73, but in fact, once the A/C unit is installed, we see our home as a place to be cooled when it is above 73 degrees outside. Because these things mediate our reality, we cannot see around them. Once we've installed the air conditioning, we ourselves are being conditioned to use it regularly even if our intention was to use it only when we were having joint pain. Downsizing is a moment in which we can actively reflect on how our things have been scripting us and ask if we want to see and act in the world that way. As Verbeek suggests, downsizing can be used a opportunity to ask, "what kind of mediated subjects do we want to be?" (Verbeek, 2011, p. 84).

## DOWNSIZING & FUTURING

In these moments of transition, people are already wrestling with visions for their future. To think that the idea of 'futuring' would

be something that is entirely brought by the design facilitator is, of course, naive. The downsizers I worked with were in a state in-between significant changes in their lives. Many had recently left the workforce (or were considering doing so) and had children who had recently moved away. Though they were all in good health, they were beginning to plan for future health deterioration. Through the downsizing process they hoped to match their surroundings to their changing selves. One downsizer I worked with relayed that the best advice he received during the process was to "envision the life he wanted to live." Downsizers are going about understanding their futures in different ways.

More evidence of futuring can be found in the different ways downsizers plan for change. While some downsizers making this change during the retirement years see this as a 'final' (or what one of Shove's own participants described as a "future proof" change), others consider platformed aspects of the change (Shove, 2012, p. 30). For one interviewee, the first downsize is an opportunity to purge her and her husband's life of possessions and move to a more central location in the city. Then they would search for a 'home base' from which they could travel throughout the majority of the year. Downsizing is a moment in time when people are actively reflecting on how to construct their lives to fit both their present and future selves.

Downsizers, of course, are already doing this work of futuring in relation to things. While discussing ridding themselves of things and moving, Gregson (2012) writes that "...destruction relates to the perceived impossibility (rather than possibility) of gifting... It requires the divestor to project these things into another social context (either known or imagined) and - project themselves into this context" (p. 102). As downsizers consider things that they will not bring with them, where that thing will end up is often determined by if they can envision it with another person. Things they can envision their friends and family using are given higher priority. These will be given away. Lower priority are items they can envision someone else (but not someone they know) using. These will be sold. Items which they can envision someone using but not in any specific way will be donated.

And finally, objects without envisionable practices will be trashed. In doing this sorting work, downsizers must imagine how things impact and fit into a person's life. Or, as Gregson indicates in the quote, sorting and ridding asks the downsizer to envision themselves living this alternative lifestyle. This act of envisioning, perhaps, can be nurtured and supported through futuring methods that make explicit the process of considering alternative outcomes.

Additionally, the downsizers I spoke with were not exclusively concerned with their own future circumstances and practices. A nearly universal experience that my participants spoke of was previously supporting a family member through the downsizing process. Nearly every downsizer I talked to had a story about the painful experience of helping someone part with their things. Often, according to downsizers, there were far too many things and the older downsizers were too attached. Their move was not voluntary (as is that of all of my participants), but required, as they were often moving from their homes to a retirement community. After reflecting on this experience, many downsizers told me that they did not want to inflict this experience on their own children. They wanted to reduce their possessions now in order to spare their children that same experience of having to sort through things that were not their own and they had not accumulated themselves. Downsizers demonstrated that they were downsizing not just to create a more comfortable or convenient life for themselves but also to improve the life of the next generation. This seems to be an opportunity, or at least an indication, that while the downsizers did not talk about their downsizing in terms of increased environmental sustainability, they might be open to the concept if framed in this way.

Yet, while downsizers are futuring, they do not have the tools to adequately envision and explore the changes that they are embarking on. Regarding the process, one participant said, "It's kind of 'chicken and the egg.' I don't know how much to get rid of before I know where we're going to move." Rather than shutting down areas of possibility with tools that help downsizers know what to get rid of, this is an example of a moment where design can open up the range of

possibilities that people can envision. This mindset of open possibility is a first step toward a person reconceiving their environment and practices. As Halse (2013) points out, "they will rarely rest assured that 'the world could be different,' at least not with the addendum 'in principle'" (p. 191). Instead, this work of creating mindsets of open possibility will allow people to explore different futures, whether independently or through designer-facilitated living labs or other workshops.






# Process

In tandem with the literature review, I conducted human-centered research to understand how downsizers themselves understood the process of downsizing and what they viewed as its pain points. To this end, I conducted primary research in two phases. In the **exploratory phase**, I conducted interviews and sent out a cultural probe kit to gain an understanding of how downsizers perceived the process. In the **evaluative phase**, after solidifying my research question, I held pilot workshops with people who were engaged in the downsizing process.

## Exploratory Research

Interviews



-  Starting the process
-  Recently completed the process
-  Participated as a couple

Cultural Probe



## Evaluative Research

Prototype Workshop



(Left) Prototype of persona cards used in the prototype workshop.

# EXPLORATORY RESEARCH

## INTERVIEWS

I conducted two phases of interviews with eight participants. Three of the participants were men and five were women. Seven were above the age of 50. Five were retired and three were still working. All participants were engaged in a voluntary downsizing. The initial interview was intended to assess how downsizers understood and approached the process. The second phase of interviews was conducted with interviewees who completed the cultural probe to follow-up on written responses.

## CULTURAL PROBE

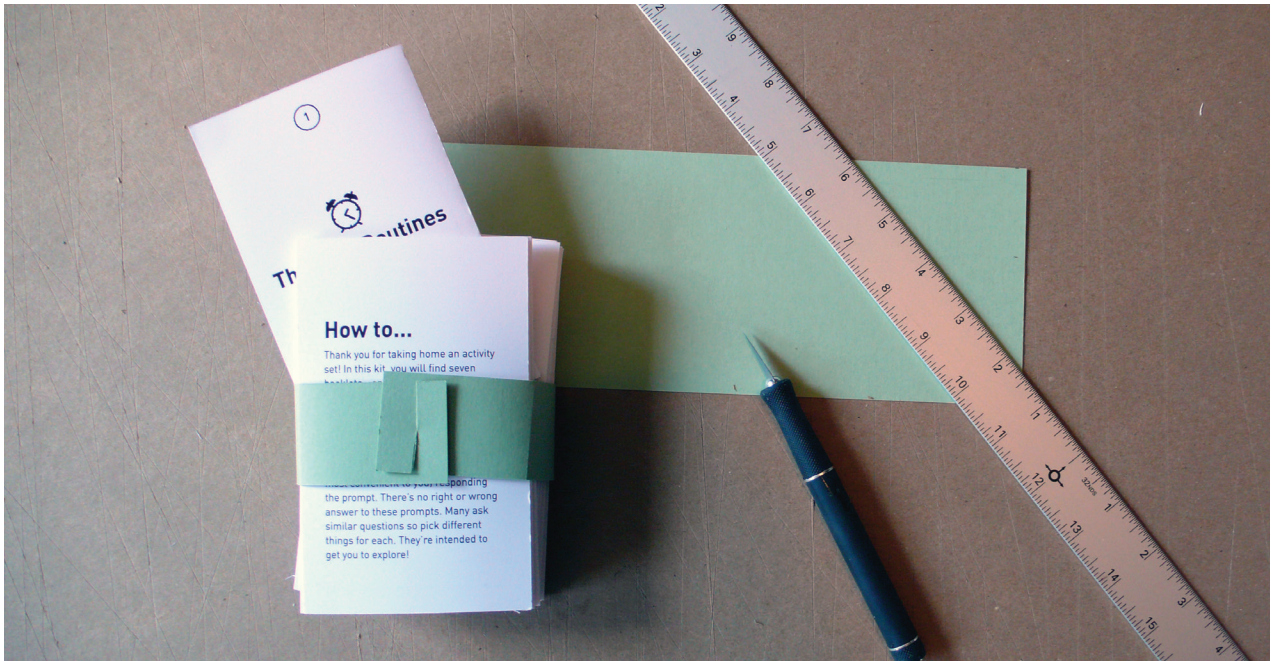
The cultural probe explored how downsizers related their things (that they were parting with or keeping), emotions about the process, and daily habits and routines. Three participants from the initial interview group completed the probe. The probe consisted of seven packets that participants were to fill out over the course of a week, one each day. The probes were divided into three types: Things & Routines, Things & Emotions, and Routines & Change.

**Things & Routines** asked participants to draw a thing they were or were not bringing with them and the corresponding routine as it currently was and would be in their new home.

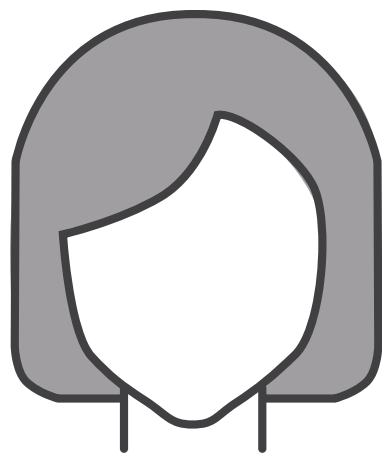
**Things & Emotions** asked participants to draw things that they were or were not bringing to their new home and the emotions associated with the process of deciding.

**Routines & Change** asked participants to draw a routine they would like to change or maintain and then draw the things associated with that routine currently and after the downsize.

(Below) Cultural probe ready to be sent out to downsizers.



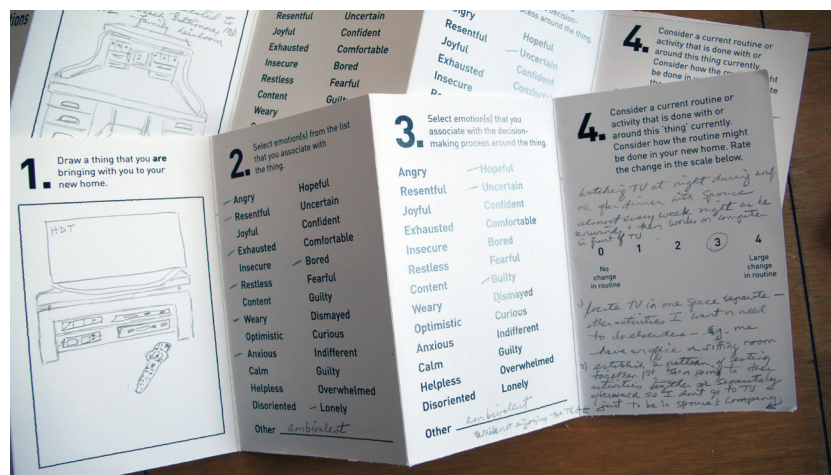
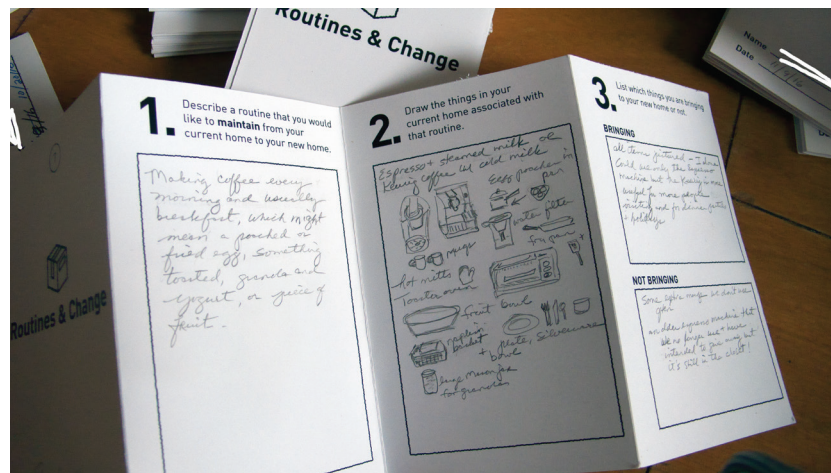
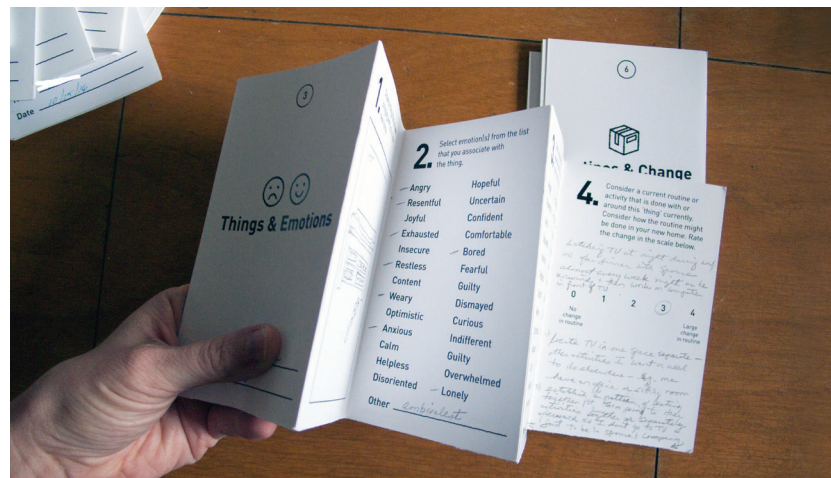
## Developing a Persona for the Downsizer



- Financially stable
- Married with children
- Children have moved out
- Retired
- Living in suburbs with 3 bedrooms

*The downsizer lived in a home that felt right when she was living with her kids and more engaged with the community. Now, with the kids out of the house, it feels like it's weighing her down and keeping her from getting out and enjoying her free time. She's looking forward and thinking about how, in the future, her health might change her needs around mobility or community, but she's not quite sure how yet.*

(Right) Completed and returned cultural probes.



## SYNTHESIS

I pulled together insights from both the primary exploratory research and the secondary research to inform my evaluative research and final design. Synthesis involved affinity diagramming findings from both the interviews and the cultural probes as well as short reflective blog posts that explored key learnings and questions that surfaced during the exploratory phase. Findings were summarized as research questions that framed my approach to the Deliberate Downsizing Toolkit.

## Key Insights from Primary Research

Downsizers are in a period of stressful transition.

Downsizers are beginning to *future* and *trial* to work through problems and support choice-making.

But, downsizers don't have frameworks to work through these choices around selecting possessions to keep and how to structure their new environment. They often feel overwhelmed and paralyzed by the process.

How can downsizers be supported through the process?

## Key Insights from Secondary Research

Practice-oriented design is developing a holistic practice-based response to the limits of behavior change methods to support long-lasting changes in lifestyle.

These methods often involve alternating between reflection and practice that manifests in living labs or practice trialing.

But, often designers exploring practice-oriented design are working to encourage transition.

What does it mean to work *with* transition rather than *for* transition?



### Research Question

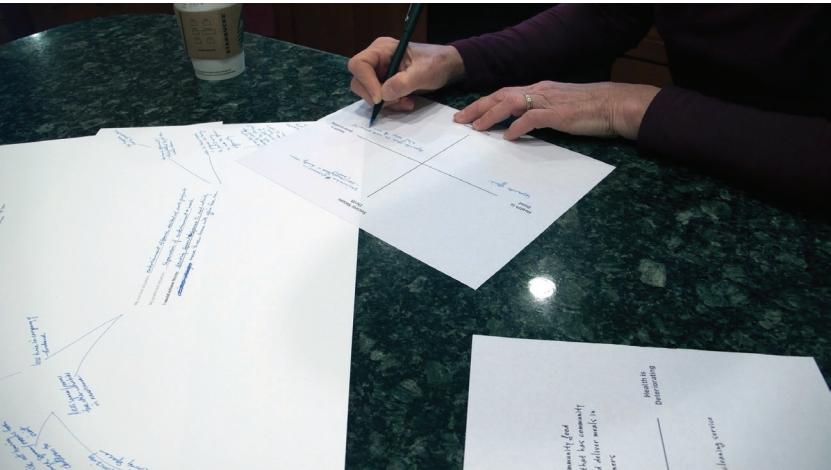
How can downsizers develop futuring methods to think broadly about the downsizing process as shaping practices?

# EVALUATIVE RESEARCH

## WORKSHOP PROTOTYPE

The workshop prototypes to trial methods for the final toolkit were conducted with four downsizers from the initial exploratory research. This included two women and a married couple. All workshops were conducted independently in the homes of the participants in the suburbs of Washington, DC and Milwaukee, Wisconsin. The workshops intended to work with contested changes that the participants were considering undergoing during their downsizing process. These ranged from the placement of a garage to storage space.

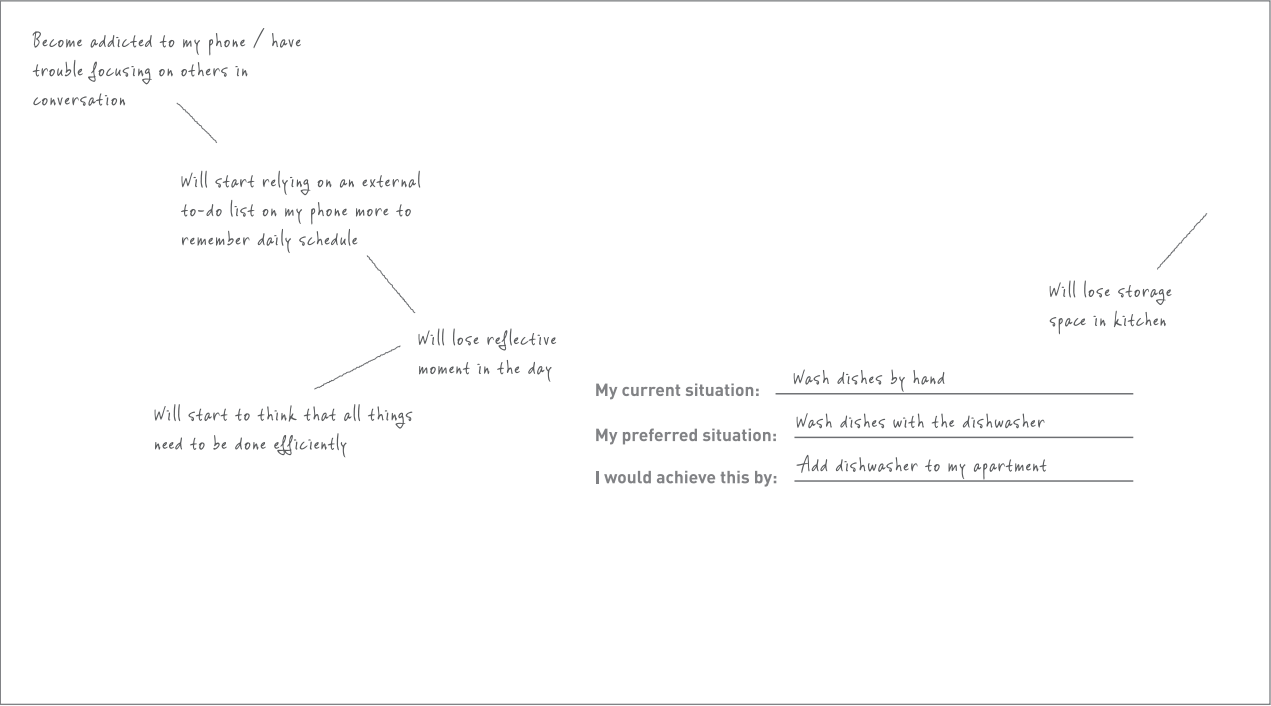
The workshop sessions lasted roughly an hour, consisting of three activities centered about these contested changes. The first activity involved problem framing through wicked solution mapping. The second activity involved thinking about alternative solutions through a 2x2 matrix. The third activity involved reflecting on alternative values and solutions through persona cards.



Participants engage with workshop activities. (Top) One downsizer writes her ideas on the 2x2 matrix. (Middle, Bottom) Downsizers examine the persona cards.

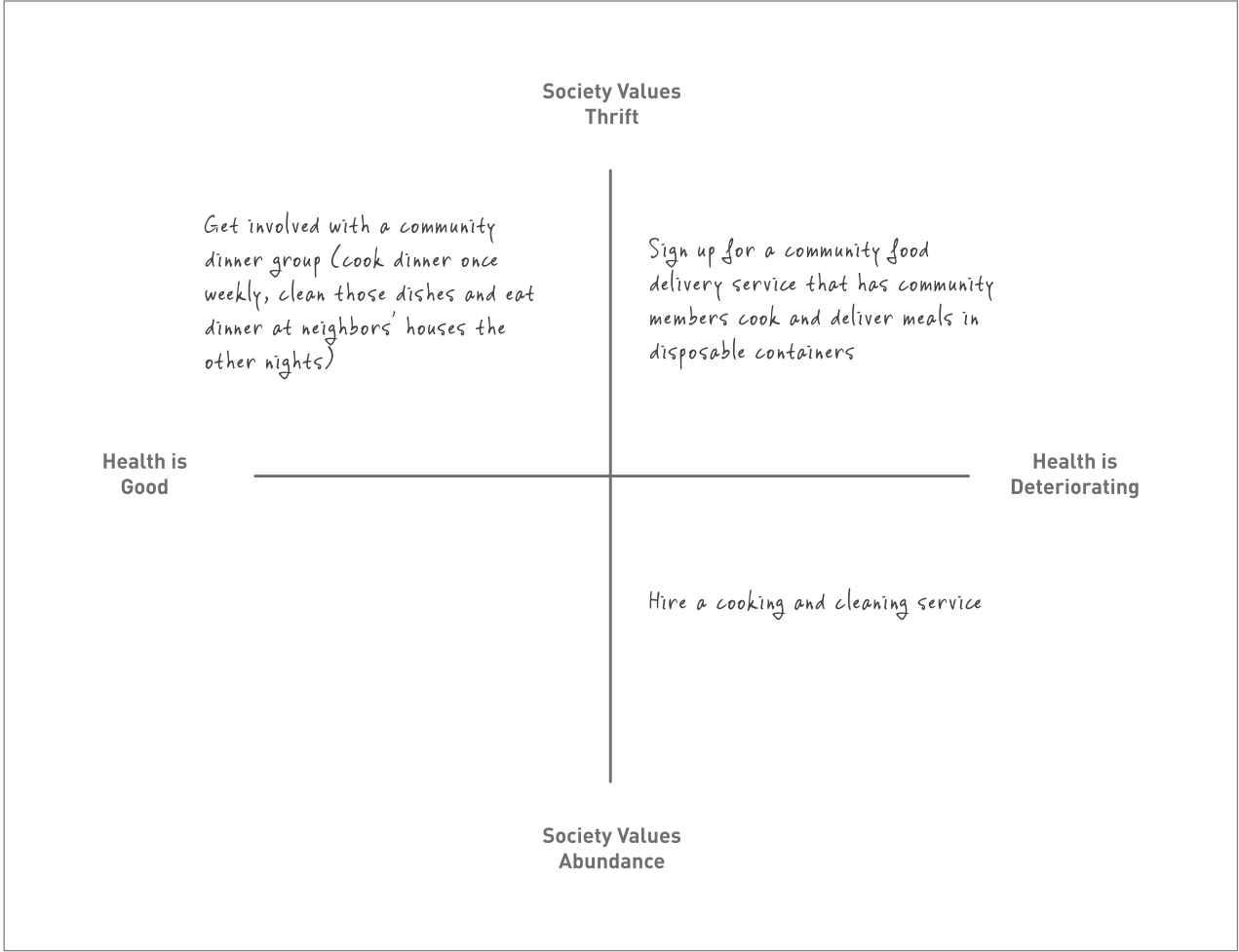


(Below) Partially completed example of the wicked solution map used in the first activity.



In the **first activity**, participants were asked to describe their current situation, and then describe a preferred situation and what the situation would look like to achieve this. Then participants used this proposed solution to create a wicked solution map. Wicked problem maps (sometimes described as system maps of wicked problems) recognize that problems are embedded in a network of related problems and attempt to map that network (Irwin & Kossoff, 2017). The wicked solution map instead intends to map the network of repercussions for any given solution. The exercise was intended to encourage participants to think more broadly about unintended consequences as well as trade-offs in design choices and practice shifts.

(Below) Partially completed example of the 2x2 matrix used in the second activity.



In the **second activity**, participants were asked to take the current situation and reassess how they might address their dissatisfaction with it if they were presented with different values and constraints. These were represented by a 2x2 matrix. Along one axis ran ‘good health’ vs. ‘bad health’ and along the other ‘value thrift’ vs. ‘value abundance.’ This encouraged participants to reframe their problem with the support of the limited framework (to provide both a starting point and avoid overwhelming the participant with possibility).

In the **third activity**, participants were given cards depicting ways in which people downsized (i.e. into a ‘tiny house’ or into an ‘intergenerational community’). To create familiarity with these downsizing outcomes, participants were asked to arrange the cards according to how similar they were to the participants’ vision for their downsize. Then participants were prompted with the idea that each of these ways of downsizing embodies a particular set of values. The participants were then asked to describe how someone with this particular set of values might resolve their dissatisfaction with the problem.

(Below) Example of the persona cards, front and back, used in the third activity. Images and quotes from Kurutz, S. (2014, April 16).



**Tiny House**

**Square Feet: 84. Possessions: 305.**

“Before going tiny, Ms. Williams wanted to downsize, inspired by a trip she took to an impoverished area of Guatemala, and the growing sense that her life was being consumed by household chores. But, as she writes in “The Big Tiny” (Blue Rider Press), her affecting new memoir, there came a point when her heart, quite literally, was no longer in a standard-size house.”

## FINDINGS

While participants addressed concrete problems, the problems often represented complex issues that involved complex social dynamics and deeply routinized practices. For example, one participant explored the environment her television would be located in. Currently, she found that the sound carried and distracted her from her work. However, she also recognized that the television was an important aspect of her relationship with her husband and, at times, a relaxation tool. For her, the solution could not possibly be as simple as getting rid of the TV or hiding it away in a room because it was so entangled with her life.

Overall, the workshop was most successful when participants worked with problem/solutions that they felt unsure about. In other words, the workshop was most useful at addressing unstable problem/solutions. When participants selected changes they were certain they wanted to make, the activities only reinforced certainty rather than providing alternate means for considering the root issues.

Participants got different value out of the process. For some, the activities led to concrete shifts in understanding and concrete actionable ideas. For others, the process provided new ways to communicate (with oneself and others) about existing unresolved concerns without resolving the issues.

### Concrete Shifts in Understanding

In the framing activity, one participant's proposed problem scenario was that she was dissatisfied with having to walk to her car in the cold winter. Her proposed solution was to move into a home with an attached garage. During the card sorting activity she found that every solution she was proposing involved living without a car (even those she associated closely with her own desired downsizing outcome). While she recognized constraints keeping her from realizing this outcome, she had a new frame for the problem.

### Concrete Actionable Ideas

One participant was brainstorming ideas for a quadrant of the 2x2 matrix for her issue of getting to her garage in the snow. Even though she did not think her values aligned with those of the quadrant, she discovered a solution might be to start wearing shoe grips. She realized she could actually start doing this now before she had downsized and exclaimed, "I don't know why I didn't think of this before!"

### New Ways to Communicate

For the couple who performed the activities together, completing each activity was much more challenging than with the individual participants. Both had different responses to the activities and even different interpretations of the prompt. Each also had drastically different thoughts on the current situation and how they ought to be solving the problem they framed in the first activity. One participant thought that they ought to be adding more space to their home to accommodate their possessions while the other believed the solution involved better organization and discarding of current possessions. Through the initial framing and mapping activity they discussed and decided both activities would need to be involved in the process of downsizing. However, they were able to negotiate and determine that adding additional space would take precedence.

The resulting Deliberate Downsizing Toolkit is a modification of the workshop prototype. I realized there was no reason that the workshop needed to be designer-facilitated. Instead, the final design uses these same methods in the form of a self-guided kit that allows downsizers to work through the process themselves. In order to be a self-guided kit, the activities needed to be formed into a more coherent toolkit that clearly explained the methods and reasons for engaging in them and provided an entry point and closure to the process.

# The Toolkit

The Deliberate Downsizing Toolkit is a self-guided toolkit that supports downsizers in thinking more expansively about the process and the choices they must make during it. While much of the existing guidance focuses on getting rid of things as efficiently and quickly as possible, this toolkit is intended to get downsizers to slow down and explore possibilities. The toolkit is not intended to provide solutions to every problem a downsizer encounters, but instead to shift mindsets about how to approach problems.

This toolkit is designed to be used at the beginning of (and throughout) the process. The kit includes one activity booklet with five activities to go through in sequence, one framing card, and nine persona cards that accompany the activities to be used as part of the activities. Participants are encouraged to use the toolkit with all parties (such as spouses) involved in the downsize process.

Step 1

## Define the Problem



### FRAMING CARD

**How?** Downsizers are given a concrete framework to describe an issue or scenario and explore how they might solve it.

**Why?** We often hold assumptions and expectations about the present and future without making them explicit. This activity helps us make these explicit both for ourselves and others involved so that we can begin to discuss and explore them further.

Step 2

## Unpack the Problem



### REPERCUSSION MAPPING

**How?** Downsizers explore the repercussions of a potential solution through a mapping exercise modified from wicked mapping.

**Why?** Once a possible change is made explicit, its short-term and long-term effects can be examined. Often a change is only considered for its direct outcome, but all things and activities are networked in our lives. This activity is an opportunity to think through how a single change might bring about other changes.



### FUTURES MATRIX

**How?** Downsizers consider other possible solutions through a 2x2 matrix.

**Why?** Getting outside of our values and current situation to think of other possibilities is not easy. This framework provides a simple way to start thinking about all the possible alternative ways to address our problems.



### PERSONA CARDS

**How?** Downsizers step back from their problem and consider how others might approach the downsizing process. The initial problem is then reconsidered with these approaches in mind.

**Why?** This provides another way to frame alternative approaches to the problem. It is easy to get stuck thinking that there's only one way to do things — this activity reminds us that there are many approaches to every problem.

Step 3

## Reassess the Problem



### REFLECTION

**How?** Downsizers reassess their initial problem statement and proposed solution.

**Why?** Reflecting on our work is always an important step to collect our thoughts. This final step provides an opportunity to revisit the initial framing and consider if the activities have shifted one's mindset.

# Futures Matrix

## How it works

In this activity, you're going to consider new approaches to solve your problem. On a piece of paper, draw a 2x2 matrix. Label one axis 'good health' and 'bad health'. Label the other axis 'I value abundance' and 'I value thrift'. Now consider the quadrants. If these scenarios were reality, how would you address the problem differently? Don't be afraid to develop improbable ideas here.

## Why do this?

Getting outside of our values and current situation to think of other possibilities is not easy. This framework provides a simple way to start thinking about all the possible alternative ways to address our problems. Even though you might not adopt a solution as you develop it here, it may help you start thinking more expansively about how to tackle roadblocks.

### 3 ACTIVITY

What you'll need



I Value Thrift  
Get involved with a community dinner group (cook dinner once weekly, clean those dishes and eat dinner at neighbors' houses the other nights)

Sign up for a community food delivery service that has community members cook and deliver meals in disposable containers

Health is Deteriorating

Health is Good

Hire a cook!

I Value



## Aging in Place Homebody

The organization offered many of the amenities available at a real retirement home, such as regular dinners together, cultural outings and ride services, but allowed residents to stay where they lived... Village events are tailored to the tastes of the community. East Falls Village residents crave social interaction, but don't want to be limited to playing mahjong or bingo.

Read more: *The Rise of Virtual Retirement Villages* at <https://tinyurl.com/virtual-retirement-communities>

Creative Commons photo by C Toews

How would the rootless RV address your problem?

THE BOOKLET



FRAMING CARD

Prompts for downsizer  
to frame situation

My current situation is \_\_\_\_\_

My preferred situation is \_\_\_\_\_

I would achieve this by \_\_\_\_\_

Space to write  
response

PERSONA CARDS



### Tiny House Inhabitant

“Ten years ago [she] sold her three-bedroom bungalow in Portland, Ore., built a tiny house on a metal truck trailer and drove it to Olympia, Wash., where it came to rest in the backyard of her [friends]. Her “great room” is too small for a couch, her upstairs is just a sleeping loft with a skylight. There’s a kitchen counter with a propane one-burner, but no oven or refrigerator. There are lights, but they run on solar power. There’s a sink and a toilet, but no running water (which means composting and no shower).


Read more: Square Feet: 84. Possessions: 305. at <https://nytl.ms/2x2golf>  
Creative Commons photo by Nicolas Boullema

Downsizing persona

Description (excerpted  
from news story)

Space to write response

Link to news article  
to learn more about  
the persona



Prompt

How would **the tiny house inhabitant** address your problem?

# GOALS OF THE TOOLKIT

1 **Encourage expansive thinking (i.e. provide support for discovering an expanded range of possibilities)**

By moving back and forth between the frame of one’s own preferences, choices, and values and alternative preferences, choices, and values, participants are given new ways to consider and articulate futures.

2 **Facilitate communication (i.e. provide framework for concretely stating experiences and desires to allow for negotiation between invested parties, like spouses).**

For those who do not reframe their decision-making, the activities are most valuable as prompts for discussion around contested futures. For example, as Kjærsgaard and Otto (2012) argue, when realizing that the children involved in their playground future study were not making innovative prototypes, “children and designers did not have to see the same things in these props. They were merely intended to serve as a common ground for negotiating design ideas from different perspectives” (p. 182). Just as Kjærsgaard and Otto (2012) understand that the participant and the designer do not have to see the same thing, neither do the participants themselves. In fact, the materials provide a space for negotiating these contested ideas, beliefs, and understandings that might have otherwise gone unspoken. However, as became evident, these activities are most useful when all parties involved in the contested space are present. While they are helpful for sorting out and expanding one’s own conception of the possible, they gain their power when facilitating the conversation between many.



# Reflection

In this thesis, I set out to bridge the gap between the practice and tangible problems that surface during the process of downsizing and the emerging methods that are surfacing out of practice-oriented design. This involves a shift from a focus on efficiency and ease to reflective possibility-expanding. We often consider downsizers as simply interested in reduced possessions. However, bringing in a practice-oriented model allows us to see that this is a moment where downsizers are reducing possessions and space in order to enable their environment, possessions, and practices to align with their shifting circumstances. The culmination of this research is a self-guided toolkit that provides a framework for downsizers to explore a more expansive problem-solving approach. This serves as an exemplary case study for considering how we can develop futuring methods for supporting transitions. These methods allow downsizers to explore and trial a broader range of possible futures, moving them away from the merely probable.

Though this thesis begins that work of developing methods for working with transition, the space is still largely unexplored and ripe for more research. I see two concrete opportunities for further study. The first opportunity for further development involves considering how to move downsizers from this toolkit to an active exploration of possibilities. How could downsizers take potential solutions developed through the toolkit and trial or prototype them before the move has occurred? Since much of the downsizers' concerns revolved around missing or losing possessions or space, how does one prototype the absence of an object or space?

The second opportunity for further development is around broadening the methods so they are applicable to more people. Though the U.S. over-50 population is growing, working with downsizers within this demographic is still a somewhat niche opportunity. However, the toolkit presents a methods framework for other groups negotiating life transitions like those moving to college, starting their first job

or having a child. Further development on this thesis could involve considering how this toolkit could be modified to become a universal set of methods for expanding possibilities within transition.

If the emerging field of Transition Design has laid the groundwork for considering how designers can work in the space of long-term social transitions, this project begins to poke at methods for considering transition on the small scale of personal life transitions. Irwin (2015) writes that "Transition Design can be positioned at the end of the continuum, where speculative, long-term visions of sustainable lifestyles fundamentally challenge existing paradigms and serve to inspire and inform the design of short- and mid-term solutions" (p. 231). The work of Transition Design requires futures to be envisioned and practices to be enacted on small-scale, local levels. The Deliberate Downsizing Toolkit explores what it means to support those in transition on the level of the human and the home.

A practice-oriented approach to design reframes the work that designers do. This thesis explores new methods for working with people and participants. The designer's role is not solely designing strategies, products, and services but also finding rich moments in which to work and developing frameworks in which other people can design.

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# Appendix

## A. PARTIAL CULTURAL PROBE

### How to...

Thank you for taking home an activity set! In this kit, you will find seven booklets—one for every day of the week! There's no need to do the booklets in any particular order. Just select a booklet that interests you that day and follow the instructions. Please spend approximately 7 to 8 minutes a day (at whatever time of the day is most convenient to you) responding the prompt. There's no right or wrong answer to these prompts. Many ask similar questions so pick different things for each. They're intended to get you to explore!



### Things & Routines


Name \_\_\_\_\_

Date \_\_\_\_\_

1. Draw a thing that you are **having trouble making a decision** about bringing or not.

2. Draw or describe a current routine or activity that is done with or around this thing.

3. Draw or describe how the routine or activity might be done in your new home.



### Routines & Change

Name \_\_\_\_\_

Date \_\_\_\_\_


1. Describe a routine that you would like to **change** from your current home to your new home.

2. Draw the things in your current home associated with that routine.

3. List which things you are bringing to your new home or not.

BRINGING

NOT BRINGING



### Things & Emotions

Name \_\_\_\_\_

Date \_\_\_\_\_

1. Draw a thing that you are **having trouble making a decision** about bringing or not.

2. Select emotion(s) from the list that you associate with the thing.

Angry

Resentful

Joyful

Exhausted

Insecure

Restless

Content

Weary

Optimistic

Anxious

Calm

Helpless

Disoriented

Other \_\_\_\_\_

Hopeful

Uncertain

Confident

Comfortable

Bored

Fearful

Dismayed

Curious

Indifferent

Guilty

Overwhelmed

Lonely

Other \_\_\_\_\_

3. Select emotion(s) that you associate with the decision-making process around the thing.

Angry

Resentful

Joyful

Exhausted

Insecure

Restless

Content

Weary

Optimistic

Anxious

Calm

Helpless

Disoriented

Other \_\_\_\_\_

Hopeful

Uncertain

Confident

Comfortable

Bored

Fearful

Guilty

Dismayed

Curious

Indifferent

Guilty

Overwhelmed

Lonely

Other \_\_\_\_\_

4. Consider a current routine or activity that is done with or around this thing currently. Consider how the routine might be done in your new home. Rate the change on the scale below.

0

1

2

3

4

No change in routine

Large change in routine

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## B. DELIBERATE DOWNSIZING TOOLKIT BOOKLET

**Nobody said downsizing was going to be easy.**

**But here's where you can start!**

Downsizing can be a long and stressful process. Much of the existing guidance focuses on getting rid of things as efficiently and quickly as possible. While you may think of the downsizing as just about getting rid of things, this toolkit will help you think about the process more broadly. This toolkit is designed to be used at the beginning of (and throughout) the process to help you slow down and explore possibilities. The toolkit will guide you through those tricky choices — around getting rid of things and how to shape your new environment — that you're encountering in order to provide more confidence and clarity in the long term.

This toolkit is best used together with all those who are involved in the downsize.

STEP 1

### Define the Problem

Pick an issue you're struggling with to figure out how (or if) to change during your downsize. Be explicit about what it is.

Activity 1: Framing Card

STEP 2

### Unpack the Problem

Explore various frameworks to understand repercussions of the problem solution and try new methods for problem solving.

Activity 2: Mapping

Activity 3: Futures Matrix

Activity 4: Persona Cards

STEP 3

### Re-assess the Problem

Revisit your original problem statement.

Activity 5: Reflection

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## Framing Card

### 1 ACTIVITY

What you'll need



#### How it works

Consider a problem you're trying to figure out how to resolve through downsizing. This might be something you know you want to change but don't know how. It might be something that you know the downsize will affect so you've been putting off thinking about. This might be something you and your partner have differing opinions on. Use the framing card to frame the problem in simple, clear statements. If you don't have a preferred situation or a way to achieve it yet, just pick one to begin.

#### Why do this?

We often hold assumptions and expectations about the present and future without making them explicit. This activity helps us make these explicit both for ourselves and others involved so that we can begin to discuss and explore them further.



## Futures Matrix

### 3 ACTIVITY

What you'll need

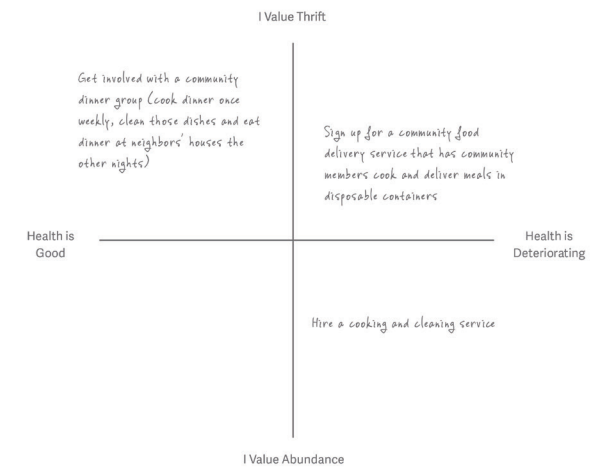


#### How it works

In this activity, you're going to consider new approaches to solve your problem. On a piece of paper, draw a 2x2 matrix. Label one axis 'good health' and 'bad health.' Label the other axis 'I value abundance' and 'I value thrift.' Now consider the quadrants. If these scenarios were reality, how would you address the problem differently? Don't be afraid to develop improbable ideas here.

#### Why do this?

Getting outside of our values and current situation to think of other possibilities is not easy. This framework provides a simple way to start thinking about all the possible alternative ways to address our problems. Even though you might not adopt a solution as you develop it here, it may help you start thinking more expansively about how to tackle roadblocks.



## Repercussion Mapping

### 2 ACTIVITY

What you'll need

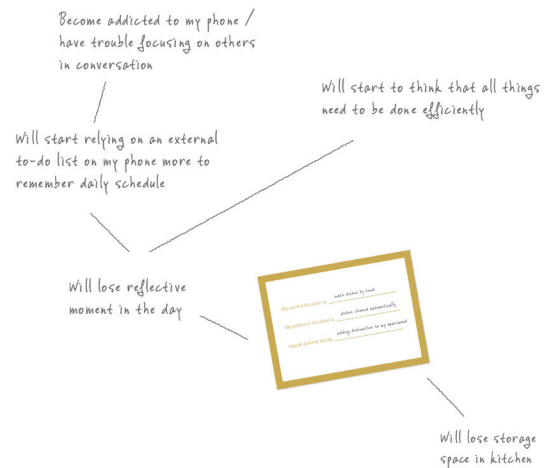


#### How it works

Using the the framing card you created in Activity 1, map out the potential ramifications for the way you choose to solve your problem. Start small and concrete and branch outward to larger scale ramifications. These can be good or bad and certain or incredibly unlikely. Like when brainstorming, there are no wrong answers here!

#### Why do this?

Once a possible change is made explicit, its short-term and long-term effects can be examined. Often a change is only considered for its direct outcome, but all things and activities are networked in our lives. A change in one can affect many other things. This activity is an opportunity to think through how a single change might bring about other changes. Is this the right change to make? Will it cause or require other necessary changes?



## Persona Cards

### 4 ACTIVITY

What you'll need



#### How it works

The persona cards depict different possible outcomes of downsizing processes. To start, you'll take a step back from your particular problem that you've been exploring in the other activities. As you look through the cards, consider what values drive that persona and how similar it is to your overall goals for your downsizing process. Then return to your particular problem. Consider how this person might solve the problem and write those approaches on the back of the card.

#### Why do this?

This provides another way to frame alternative approaches to the problem. It is easy to get stuck thinking that there's only one way to do things -- this activity reminds us that there are many approaches to every problem.



C. PERSONA CARDS

# Reflection & Re-assessment

How it works

Reflect on the activities you've done around your problem. Consider if you want to restate how you will achieve your preferred situation. Perhaps you want to restate the situation altogether. You may want to change nothing but have more confidence about this choice going forward.

Why do this?

Reflecting on our work is always an important step to collect our thoughts. Consider what you took away from these activities. How will it change how you take on change or reinforce your approach to your choices about downsizing?

5 ACTIVITY

What you'll need

My current situation is wash dishes by hand

My preferred situation is reduce the number of dishes used

I would achieve this by join community cooking group

You can continue to use this kit as difficult choices and issues arise throughout the downsizing process. Take from them what is helpful and discard the rest. Eventually, this process will become second nature and you will no longer need the kit for support.

**Happy Downsizing.**

### Restyler

[She] had a mix of traditional and French country furniture, but she wanted a whole new look. Her old stuff was carted off to the Salvation Army, and the two women shopped for a new, midcentury-modern look.

Read more: Interior Designers Help Seniors Downsize in Style at <https://tinyurl.com/downsize-in-style>

Creative Commons photo by Erika

### Clusterer

In addition to those established by and for members of religious groups, they include retirement communities for military officers, for gays and lesbians, and for the alumni of particular colleges and universities.

Read more: A New Spin on Senior Living at <https://nytl.me/2n9KMow>

Creative Commons photo by Artista Pereira

### Aging in Place Homebody

The organization offered many of the amenities available at a real retirement home, such as regular dinners together, cultural outings and ride services, but allowed residents to stay where they lived... Village events are tailored to the tastes of the community. East Falls Village residents crave social interaction, but don't want to be limited to playing mahjong or bingo.

Read more: The Rise of Virtual Retirement Villages at <https://tinyurl.com/virtual-retirement-communities>

Creative Commons photo by C. Brown

How would **the restyler** address your problem?

How would **the clusterer** address your problem?

How would **the aging in place homebody** address your problem?



### Rootless RV'er

Some live in small trailers that cost a few thousand dollars and are barely larger than a van. Others cruise the country in expensive rigs — such as those favored by celebrity R.V. enthusiasts like Clarence Thomas and Robert De Niro — with flat-screen televisions and king-size beds. Some seek the country's most isolated nooks and crannies; others stay in plush R.V. resorts that offer more activities than costly summer camps for children. Most travel as couples; a few go solo.

**Read more:** *R.V. Life: Getting Kicks at Age 66* at <https://ny1.ms/2n6iizm>  
Creative Commons photo by Yellowstone National Park



### Thrifty Liver

He is, by his own reckoning, a wealthy man, without want, but he and his wife, who have one child, spend an average of just twenty-four thousand dollars a year. Adeney is a kind of human optimization machine, the quintessence of that urge, which is stronger in some of us than in others, to elevate principle over appetite, and to seek out better, cheaper ways of doing things. He presents thrift as liberation rather than as deprivation.

**Read more:** *The Scold: Mr. Money Mustache's Retirement (Sort Of) Plan* at <https://tinyurl.com/frugal-guru>  
Creative Commons photo by Mark Mathias



### Neighborhood Walker

We realized 'aging in place' means a lot more than just a comfortable house," Mr. Brown said. "So we began thinking more about 'aging in community.' That means an urban neighborhood where you can walk or take transit to just about everything you need."

**Read more:** *The Future of Retirement Communities: Walkable and Urban* at <https://ny1.ms/2jR0av3>  
Creative Commons photo by Dan Reed



### Intergenerational Community Citizen

There seems to be a rule that if retirees move to a communal environment, it must consist only of other retirees. But some older adults are challenging that notion by choosing intergenerational cohousing, living side by side with people of all other ages, including singles, childless couples and families with children.

**Read more:** *In Retiree Housing, Talking About Multigenerations* at <https://ny1.ms/2mwuJYU>  
Creative Commons photo by Ali Embar



### Upsizer

We were looking for our dream retirement home," said Moe Modecki. "So, we never have to move again. With this home, we actually upsized in terms of space because the downstairs two-thirds of it is finished. I've got the man cave. We've got a full bedroom, full wet bar, the works. This is where we can entertain for the rest of our lives."

**Read more:** *More Baby Boomers Buying Bigger Homes Instead of Downsizing* at <https://tinyurl.com/upsizing>  
Creative Commons photo by Nicki and Karen



### Tiny House Inhabitant

Ten years ago [she] sold her three-bedroom bungalow in Portland, Ore., built a tiny house on a metal truck trailer and drove it to Olympia, Wash., where it came to rest in the backyard of her [friends]. Her "great room" is too small for a couch, her upstairs is just a sleeping loft with a skylight. There's a kitchen counter with a propane one-burner, but no oven or refrigerator. There are lights, but they run on solar power. There's a sink and a toilet, but no running water (which means composting and no shower).

**Read more:** *Square Feet: 84, Possessions: 305* at <https://ny1.ms/2k2goif>  
Creative Commons photo by Nicolas Boulton



How would **the rootless RV'er** address your problem?



How would **the thrifty liver** address your problem?



How would **the neighborhood walker** address your problem?



How would **the intergenerational community citizen** address your problem?



How would **the upsizer** address your problem?



How would **the tiny house inhabitant** address your problem?

