

## Housing & Home Care

### How to tell a loved one its time to make a move?

Families, relationships and responses to aging are all very different, from family to family. A “how to guide” will not be successful for all! Here are some helpful observations that may guide your plan to communicate to a family member or loved one the need to move.

- The ability of families to communicate openly and intentionally is a subject of centuries of discussion, concern and struggle. Accept the difficult of the task and do not have unrealistic expectations about the communication process.
- Strive for “partnership” approaches to information and recommendations. If you seek to give another something, and believe that person ought to accept it, you have positioned yourself “over” that person. Therefore,
- Manage the inequality in every relationship. Your loved one may depend upon you and respect you for some things, but have no tolerance for your abilities in others. Respect for your opinion and guidance is earned, not “imputed” by virtue of your role or position with the other person.
- Know the dynamic of communication: people are not often forthcoming in talking about areas of their life that are intensely personal or threatening to their overall wellbeing. Appreciate the gravity of the subject you bring up: it may be a matter of “problem management” for you, but your loved one is facing life, death or living hell when subjects are discussed such as loss of home, finances, transportation, memory, daily routine and physical self-sufficiency. You may be “proud” of your ability to discuss these things, but that does not make you a hero in the eyes of the person whose life these decisions may terrorize.
- Don’t assume that your loved one’s illness or need in old age will somehow remedy communication problems that have been part of your relationship for decades. Medical needs and physical problems can lead to an atmosphere of “coercion” because the needy person often does not feel there is much of a meaningful choice, and that person also has to face depression in the face of permanent losses.

If you are a concerned child whose parent(s) extend trust to you, and you have had a past of open and honest communication, then your communication may go well.

If you have had troubled communication events with your parent(s) most of your life, then this step will be more difficult. A counselor, clergy or trusted professional may be a good confident to help you. *The* person trying to help needs to be cared for as well. Support groups are essential in this process.

### Using Tools

Sometimes, working with an “objective” document such as a questionnaire or checklist, can establish a less threatening discussion. You can give this

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checklist to a loved one or work on it together with him or her. The answers will begin to clarify the need to move.

You may introduce the checklist by saying telling your loved one that you found this on our website and thought it would be a good thing to discuss together so that his or her future could be as happy and secure as possible. Focus on the positive value of your loved one living in the right environment, not on the “problems” associated with moving. They can be obstacles once a basic understanding is shared between the two of you.

You can both fill out separate copies of this checklist and share results. You ability to be comfortable with the differences will build trust.

Word to the wise: when discussing these matter, make sure that what you two talk about is private and not overheard by a third party. It is much easier to do this one-on-one than in a three or four way conversation—that can come later. I recommend you start on the basis of individual conversation.

While there is no formal way of “weighting” these answers, you can ask your loved one which questions seemed most important to them and let them drive the agenda from that point.

## Communication Checklist

### Basic questions to consider yourself or with other(s) living with you:

Not Important = 1

Very Important = 10

- |   |   |   |   |   |   |   |   |   |   |    |
|---|---|---|---|---|---|---|---|---|---|----|
| 1. More Community and People                  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2. More Privacy, Quiet and Isolation          | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 3. With Others My Age                         | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 4. With Others of All Ages                    | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 5. Spend More Money on Housing                | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 6. Spend Less Money on Housing                | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 7. Geographical/Activity Preference:<br>_____ | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

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8. Geographical/Activity Preference: \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10
9. Geographical/Activity Preference: \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10
10. Near Family Member/Friend: \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10
11. Near Family Member/Friend: \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10
12. Near Family Member/Friend: \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10
13. Near Family Member/Friend: \_\_\_\_\_ 1 2 3 4 5 6 7 8 9 10
14. More Security Where I Will Live 1 2 3 4 5 6 7 8 9 10
15. Medical/Supportive Care in Neighborhood 1 2 3 4 5 6 7 8 9 10
16. Leaving your current neighborhood 1 2 3 4 5 6 7 8 9 10
23. Other Question: 1 2 3 4 5 6 7 8 9 10
- 24: Other Question: 1 2 3 4 5 6 7 8 9 10
25. Other Question: 1 2 3 4 5 6 7 8 9 10
26. Other Question: 1 2 3 4 5 6 7 8 9 10

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## To discuss with family members/friends who you assume have interest in your future care:

- |   |   |   |   |   |   |   |   |   |   |    |
|---|---|---|---|---|---|---|---|---|---|----|
| 1. Being near family members                                      | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2. Being near current friends & community                         | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 3. Re-establishing new friends & community                        | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 4. Maintaining most of your possessions in your next home         | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 5. Having a yard and grounds                                      | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 6. Having a yard and smaller grounds                              | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 7. Having no yard   | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 8. Maintaining car for next few years                             | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 9. Giving up car in next few months                               | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 10. Having someone else cook for you most of the time/eat out     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11. Doing most of your own cooking                                | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 12. Having medical assistance nearby                              | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 13. Having a place to house overnight guests and family members   | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 14. Remaining close to interest-group, religious/cultural friends | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 15. Remaining close to friends in your current neighborhood       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 16. Leaving your current neighborhood                             | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

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17. Having yard and house maintenance provided for you, all season 1 2 3 4 5 6 7 8 9 10
18. Living in a walkable community or town 1 2 3 4 5 6 7 8 9 10
19. Living in a situation where you can leave & travel overnight 1 2 3 4 5 6 7 8 9 10
20. Living in a situation where you can have a pet 1 2 3 4 5 6 7 8 9 10
21. Living in a situations where there are planned events/activities 1 2 3 4 5 6 7 8 9 10
22. Other Question: 1 2 3 4 5 6 7 8 9 10
23. Other Question: 1 2 3 4 5 6 7 8 9 10
- 24: Other Question: 1 2 3 4 5 6 7 8 9 10
25. Other Question: 1 2 3 4 5 6 7 8 9 10
26. Other Question: 1 2 3 4 5 6 7 8 9 10

## Inventory for Personal Security Checklist Checklist

This is another inventory tool that can be used in families to introduce a discussion about the best place to live.

Each person has a different tolerance for risk and need for security. As we age, we may find ourselves feeling “more vulnerable” to people who might take advantage of us because:

- We may not have kept current with standards of business transactions and internet security protocols
- We may continue old habits where we exhibit trusting familiarity and disclose excessive information to people who might use that information to harm us

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Please use this checklist to do a “personal inventory.” Next, share it with a family member or trusted friend. If you live with a spouse or partner, do one each separately before sharing your results.

My Habits and Concerns about Safety    1= almost always/frequently    10= not at all

## PHYSICAL ENVIRONMENT

- |  |   |   |   |   |   |   |   |   |   |    |
|--|---|---|---|---|---|---|---|---|---|----|
| 1. Where I live is safe from intruders   | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2. My home is free of physical obstructions and hazards that could cause me or visitors harm   | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 3. I have fallen in the past year  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 4. I have to perform chores/activities in my home or on my property that increase my risk of injury  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 5. The “risk” of performing chores/activities in #3 are acceptable to me, as they relate to the potential harm                                       | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 6. I am careful to lock and secure my home when I leave  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 7. I am careful to use appliances and fixtures as required so they do not cause a hazard (turn off oven, coffee pot, space heaters, candles, etc...) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 8. I wear an emergency call pendant so if I fall I can call for help without going to the telephone  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 9. My pet(s) causes a hazard for me  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 10. I typically allow food to spoil  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11. I have had rat, mice or vermin infestation in the last year  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 12. I have injured myself with an appliance in the last year   | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 13. It is easy and safe to shower or bathe myself  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 14. I have had dangerous situations with broken appliances or equipment in the past year   | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 15. My home is frequently too hot or too cold  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

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16. My smoke detectors work properly 1 2 3 4 5 6 7 8 9 10

17. I have a home alarm system and use it regularly 1 2 3 4 5 6 7 8 9 10

### TRAVELLING

18. I am comfortable driving a car 1 2 3 4 5 6 7 8 9 10

19. I would be happy not to drive a car 1 2 3 4 5 6 7 8 9 10

20. I have had a motor vehicle accident in the past year 1 2 3 4 5 6 7 8 9 10

21. I have difficulty getting in and out of my home 1 2 3 4 5 6 7 8 9 10

22. I stay home more than I otherwise would because of safety concerns 1 2 3 4 5 6 7 8 9 10

23. I have slipped and fallen on the snow/ice 1 2 3 4 5 6 7 8 9 10

### PERSONAL IDENTITY AND THEFT

24. I use the computer and perform business transactions on it 1 2 3 4 5 6 7 8 9 10

25. I have purchased with a credit card on-line 1 2 3 4 5 6 7 8 9 10

26. I have provided my social security number and birth date on line 1 2 3 4 5 6 7 8 9 10

27. I talk to people and provide information to them when they call to solicit me by phone or in person at my door 1 2 3 4 5 6 7 8 9 10

28. I perform most banking functions in person at a bank where the staff know me 1 2 3 4 5 6 7 8 9 10

29. I have been victimized by fraud in this past year 1 2 3 4 5 6 7 8 9 10

30. I have a debit card and use it at ATMs for cash 1 2 3 4 5 6 7 8 9 10

31. I am susceptible for hard luck stories and would like to be generous to those in need 1 2 3 4 5 6 7 8 9 10

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32. People I hire to come to my house and perform work have had criminal background check clearance and are bonded

1 2 3 4 5 6 7 8 9 10

33. Companies who send personnel to my home to work have had criminal background check clearance and are bonded

1 2 3 4 5 6 7 8 9 10

34. I attract people to my home because I have valuable things and we enjoy them together (like a home theatre, antique collection, garden)

1 2 3 4 5 6 7 8 9 10

35. I am concerned that certain family members may try to steal from me.

1 2 3 4 5 6 7 8 9 10

36. I am concerned that family members may be jealous of each other.

1 2 3 4 5 6 7 8 9 10

37. I am concerned that certain acquaintances/neighbors may want to take advantage of me

1 2 3 4 5 6 7 8 9 10

**OTHER (please create and score your own)**

1 2 3 4 5 6 7 8 9 10

1 2 3 4 5 6 7 8 9 10

1 2 3 4 5 6 7 8 9 10

1 2 3 4 5 6 7 8 9 10

1 2 3 4 5 6 7 8 9 10

1 2 3 4 5 6 7 8 9 10

1 2 3 4 5 6 7 8 9 10