

## Needs Assessment Worksheet

**Name:**

**Date:**

### Directions

Think about your current situation. Use the checklist in Part 1 to identify things you need to achieve your goals. Then in Part 2, list up to five key people involved in your transfer situation. Think about the transfer from their point of view. Use the checklist in Part 3 to identify their needs. Circle the items where you are not sure, which suggest the need for future conversations. Use Part 4 to list some ways that your transfer could meet both your needs and the needs of the other parties involved.

### Part 1: Your Needs

Think about your current situation. What do you need to achieve your goals? Check off the items below that reflect things you need to achieve your goals. Add other needs that are not on the list.

- Land
- Farm/Ranch Infrastructure
- Housing
- Capital
- Income
- A role in farm/ranch management
- Relationships
- Health Care
- Ability to take care of family members
- Stewardship of the land
- To pass down a legacy
- Other needs (please describe):

Notes:

**Part 2: People Involved in Your Transfer**

Use this table to list up to five key people who are involved your farm or ranch transfer. Describe their interest in your transfer situation. Add their contact information for easy reference.

Name of Key Person	Their interest in your farm/ranch transfer situation	Their contact information

**Part 3: Needs of People Involved in Your Transfer**

Choose one or two key people from your list above.

Name:

Name:

What are their needs? Check off things you know for sure, add anything that is not included in the list, and circle any items you are not sure about so you can talk to them about it.

- Land
- Farm/Ranch Infrastructure
- Housing
- Capital
- Income
- A role in farm/ranch management
- Relationships
- Health Care
- Ability to take care of family members
- Stewardship of the land
- To pass down a legacy
- Other needs (please describe):

List any follow up conversations you need to have:

Notes:

**Part 4: Alignment of Needs**

As you look at both lists of needs, can you think of some ways that your transfer situation can be designed to meet both your needs and the needs of those involved in your transfer? List your ideas here.

