

Needs Assessment Worksheet

Directions

Think about your current situation. In Part 1, use the checklists to identify things you need to achieve your goals. Start with your tangible needs – the physical assets involved in your transfer. They may include real estate, equipment, and other agricultural assets, as well as financial needs like income.

Then consider your deeper personal needs. How do you feel about the transfer process and what lies ahead? These feelings are a window into whether or not your needs are being met. Follow the 3-step process to connect your feelings to your needs so that you can achieve the goals of your transfer process.

In Part 2, list the main parties 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

Tangible Needs

Think about your current situation. What physical assets do you need to achieve your goals? What else do you need to feel comfortable passing on your farm? Check the items below that reflect things you need and add any other needs that are not on the list.

- ☐ Cash
- ☐ Commitment to conservation of the land
- ☐ Equipment (specify as needed)
- ☐ Farm/Ranch infrastructure
- ☐ Health care
- ☐ Housing
- ☐ Income
- ☐ Investments
- ☐ Land
- ☐ Long term care
- ☐ Reduce or eliminate debt
- ☐ Role in farm/ranch management
- ☐ Vacations
- ☐ Vehicles
- ☐ Other needs (please describe):

Deeper Personal Needs

Transferring your farm may mean changes in multiple areas of your life, not just a change in your career or business role. This kind of life change can evoke a wide range of feelings.

Your feelings provide information – they are a window into your deeper personal needs. The following steps will lead you through a process to identify your feelings and needs and decide how to address them in your transfer.

Step 1: Name Your Feelings

The following list offers examples of feelings. In the first table, circle the positive feelings you have when you think about your transfer process and your changing roles. Use the last two spaces to add any other feelings you may have about the process. These are the kinds of feelings that arise when needs are met:

Calm	Excited	Proud
Confident	Enthusiastic	Relieved
Content	Fulfilled	Trusting
Delighted	Grateful	
Engaged	Hopeful	

Now circle the negative feelings you have when you think about the transfer process. These are examples of feelings that arise when your needs are not met. Use the last row to add feelings this list may have missed.

Angry	Discouraged	Overwhelmed
Anxious	Distrustful	Sad
Bitter	Exhausted	Sad
Cantankerous	Frustrated	Stressed
Confused	Heartbroken	Worried

Step 2: Connect Your Feelings to Needs

Now that you have named some of your feelings, what can you learn from them? Feelings reveal whether or not your deeper personal needs are being met. Beyond achieving material needs like housing and income, do you need social connections or to leave a legacy? Or for the process to go smoothly, do you need to be recognized and respected?

In the following table, circle any deeper personal needs that will help you achieve your transfer goals. Use the bottom row to add any that are not included in this list of examples.

Acceptance	Family relationships	Respect
Affection	Legacy	Rest
Belonging	Love	Security
Clarity	Meaning	Support
Communication	Peace of mind	Trust
Community	Power	Understanding
Connection	Purpose	Wellbeing

Add the feelings you circled in Step 1 to the left column of the box below. Then, for each feeling, identify the deeper need it signifies. Consider the example in the box to get started.

Feelings	Needs
<i>Worried: I feel anxious about how long this process will take.</i>	<i>I need clarity and communication about how to move forward.</i>

Step 3: Ensure your deeper personal needs are reflected in your Vision and Goals.

Refer to the needs you identified above. Fill out the table below to explore how you are meeting your deeper personal needs now, and how you might meet them after the transfer. Consider the example in the box to get started.

Deeper Personal Need	How is it being met now?	How can it be met in the future?
<i>A sense of meaning and purpose</i>	<i>Producing food for my family and community</i>	<i>Stay active in Farm Bureau and volunteer on local boards</i>
<i>Family relationships and connection</i>	<i>Farming with family members</i>	<i>I will move to a smaller house on the property so my daughter can move her growing family into the main farmhouse. I'll help out on the farm and with childcare.</i>

Once you have filled out the table above, revisit your original vision and goals. If necessary, update them to make sure they reflect all of your needs.

Part 2: Needs of People Involved in Your Transfer

Identify the key parties involved in your transfer. What are their material 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.

- ☐ Cash
- ☐ Commitment to conservation of the land
- ☐ Equipment (specify as needed)
- ☐ Farm/Ranch infrastructure
- ☐ Health care
- ☐ Housing
- ☐ Income
- ☐ Investments
- ☐ Land
- ☐ Long term care
- ☐ Reduce or eliminate debt
- ☐ Role in farm/ranch management
- ☐ Vacations
- ☐ Vehicles
- ☐ Other needs (please describe):

List any follow up conversations you need to have:

How do we deal with their feelings and deeper personal needs? MAYBE

Take a moment to reflect. Have you noticed any feelings coming up that may point to whether their deeper personal needs are being met? If so, write a few sentences about how you plan to address these as you move through the transfer process.

Part 4: Alignment of Needs

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

