TOOL: KNOWLEDGE AND SKILLS ASSESSMENT

This tool is intended to help you and those involved in your transition understand who has what skills, and where people need to develop skills. This will help you decide who should do what tasks, as well as help you understand who needs further training and what types of training to seek out for a successful transition. For example, does a farmer involved in your transition need to learn how to do tractor maintenance? This sample list includes day-to-day farming tasks, business management skills, and communication skills.

Adapted from FCC's Assessment tool: https://www.fcc-fac.ca/fcc/resources/transition-assessment-tool-e.pdf

Legend 1 = This team member is fully able to handle this task 2 = This team member is developing needed expertise 3 = This team member has no expertise in this area 4 = Our team has no expertise in this area • Assess your and others skills/knowledge in each area • Cross off tasks that aren't applicable to your operation and add tasks that are missing • Circle tasks where you or your team can gain skills • Mark with * tasks where you need professional support • *Note this is not a tool to identify who does what (see Farm Decision Making Framework Tool) • You may want to focus just on yourself to start Date:_____		**Self**	**Team member 2**	**Team member 3**	**Team member 4**	**Team member 5**	**Team member 6**	**Comments**
Operations	Equipment maintenance							
	Cropping decisions/planning							
	Field prep/Soil building							
	Water Access/Infrastructure							
	Seeding							
	Harvest							
	Transportation/Delivery							
	Fencing install/maintenance							
	Inventory/Storage management							
	Facilities upkeep							
	Pest/weed management							
	Animal health							
	Livestock handling							
	Marketing, social media							
	Certifications (e.g. Organic, GAP)							
Financial / Business Management	Bookkeeping/tax documents							
	Understanding loans / financing							
	Capital investments/purchasing							
	Budgets/projections							
	Understanding tax considerations							
	Seeking investments/investors							
	Pricing products							
	Wealth management							
	Licenses, permits, insurance							
	Shareholder agreements							
	Knowledge of farm business structure							
	Business planning							

YOUNG AGRARIANS

Legend 1 = This team member is fully able to handle this task 2 = This team member is developing needed expertise 3 = This team member has no expertise in this area 4 = Our team has no expertise in this area • Assess your and others skills/knowledge in each area • Cross off tasks that aren't applicable to your operation and add tasks that are missing • Circle tasks where you or your team can gain skills • Mark with * tasks where you need professional support • *Note this is not a tool to identify who does what (see Farm Decision Making Framework Tool) • You may want to focus just on yourself to start Date:_____		**Self**	**Team member 2**	**Team member 3**	**Team member 4**	**Team member 5**	**Team member 6**	**Comments**
People	Managing employees/volunteers/interns							
	Navigating HR: Worksafe, payroll, etc.							
	Training and development							
	Customer relations							
	Mentorship							
	Decision making and leadership							
	Conflict resolution							
Transition Planning	Goal and vision setting							
	Strategic planning							
	Administration							
	Risk assessment							
	Governance							
	Legal expertise							
	Communication skills							
	Land Agreements & Negotiations							
	Estate Planning							
Co-op / Community Development	Knowledge of co-op principles/values							
	Co-op governance							
	Developing community agreements							
	Community support							
	Drafting co-op bylaws/documents							
Other								