### One-on-One Consultation Checklist

**What is the farmer’s stage of farm development?**
*After a discussion about stages of development circle the stage that best represents this farm.*

<table>
<thead>
<tr>
<th>Prospective</th>
<th>Start-up</th>
<th>Establishing</th>
<th>Strategizing</th>
<th>Refining</th>
</tr>
</thead>
</table>

**Conversation Openers**
*What would you like to focus on today? What would you like to accomplish with our discussion?*

**Farmer States their Area of Focus:**

1. *What are some key phrases or words that the farmer uses to describe the area of focus?*

2. *How has the farmer tried to address the stated focus? What have they done or who else have they talked to help improve the area of focus?*

3. *Do you believe there is a more critical area of improvement that the farmer would be best served to identify and address first. Can you guide them to identifying it with a question such as, How are things going with ______________?*

4. *Are there aspects of communication, decision making, goal setting, or time management in the farmer’s area of focus?*

→ If yes, “how would you rate your ability in each of the skill areas in relation to the problem or need?”
<table>
<thead>
<tr>
<th>Self rating (1-5)</th>
<th>Skill Areas</th>
</tr>
</thead>
</table>
| 1-novice, 2-adv beg, 3-competent, 4-proficient, 5-expert | **Communication**: Identify the relationships and roles on the farm and tools to improve communication between family members, farm partners, employees, customers and other decision makers.  
**Decision-making**: Utilize existing tools to prioritize tasks and plan in advance. Have a clear understandings of management roles and responsibilities, and criteria on what decisions can be made by the person in charge and which require all stakeholder’s input.  
**Goal-setting**: Develop farm goals that integrate quality of life values and relationship goal criteria into farm decision making.  
**Time Management**: Utilize existing resources to assist farmers in optimizing farm roles and responsibilities. |
| Communication |  |
| Decision Making |  |
| Goal Setting |  |
| Time Management |  |

**Brainstorm what aspects of the skills would help to address the area of focus:**  
(Use the Inquiry Prompts; reference the Stage & Skills Document; inquire about specific challenges in the skill area, etc.)

**Feedback:**  
(referrals made; handouts recommended; further planning suggested, etc.)

**Next Steps:**  
(follow up call; action plan, etc.)