

*This is an example of an assessment done by Tracie Utter. It is two pages of a multiple page document. This plan can be used by an organizing team or by an individual that wants to organize by themselves. This is a room-by-room analysis which you keep. We walk through your home and analyze your needs. Shortly thereafter, this document is provided through e-mail and/or by mail.*



### Needs Assessment for Getting Organized Susie & Bob Dieruf

*Overall Goals:*

- 1) Get family organized
- 2) Get schedules organized
- 3) Get 1st floor ready for company

<i>Goals/Vision</i>	<i>Challenges</i>	<i>Notes</i>	<i>Priority</i>	<i>Who</i>
1 <sup>st</sup> floor				
Area of focus: <b>Office</b>				
Expand filing system	Current system is not used as well as could be	Move current filing box by desk in office, consider color coded folders, label everything, establish as main source of stored paper	#1	Susie & family helper
Centralize paper by utilizing expanded filing system and developing system for To Do and Action items	Stacks all over house	Requires change in habit	#1	Shannon & Family helper
Create visual To Do/Deadline/Calendar board...probably in kitchen...or something that can be carried around		See ideas in kitchen section, also <a href="#">Daily System - Espresso stain   Pottery Barn</a> or <a href="#">Novelty Gifts, Cool Stationery, Unique Greeting Cards - Fun Products From Knock Knock</a>	med	Shannon & Family helper (might need Tracie to assist)
Convert paper to digital. Scan papers and keep filed via scanning software.	Lack space to file paper	Consider scanning system like <a href="#">The Neat Company - Neat Receipts</a> or <a href="#">Rack2-Filer Scanning and Document Organization Software   Fujitsu Scanners : FUJITSU United States</a>	low	Bob (might need Tracie to assist)
Convert paper addresses into a digital format	Process is time consuming and software needed	Consider including addresses in e-mail system	low	Shannon

Repurpose cabinets. Sort and purge then consider if space could be used as office storage			medium	Shannon & Family helper
<b>Area of focus: Kitchen</b>				
Better utilize communication center (the corkboard)	Too small	Consider painting area with specialized paint – chalkboard or magnetic paint <a href="http://RustOleum.com">RustOleum.com</a> Available at Lowe's, Home Depot and paint stores	high	Handyman, then Susie
Repurpose pantry, possibly into a desk/storage area. Since the office (sunroom) is limited in storage, this closet could be changed into a desk (or at least a working surface) with storage. Shelves and a filing system could be added. The sunroom office will continue to be used as is. The kitchen closet would be more of a place to centralize papers.	Not useful as a pantry	Get rid of anything not used, move appropriate items to basement. If changed to a desk, buy containers to store supplies and files. See example <a href="#">Closet Desk Conversion « The Crafts Dept.</a> A lot of the paper currently in the library could be moved here. A lot of books could be moved here...especially cookbooks.	#1	Handyman, then Shannon
<b>Area of focus: Hall closet</b>				
Sort thru and give away items. Limit remaining items to what fits.	Small		low	Shannon & Susie
<b>Area of focus: Library</b>				
Sort and purge all storage areas: closet, shelves, cabinets, chests and desk	Lots of stuff	If there are like items in rest of the house, combine for example, clothes in closet can go upstairs then pictures could be moved from drawers to closet in some type of chronological system	Med	Shannon & Susie
Better utilize closet		Consider adding shelves in closet with limited hanging space. Or, use concept like kitchen and change into a desk/storage area (see above)	med	Shannon
Consider layout and use of each piece of furniture	Small room		med	Shannon & Susie

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