

CLIENT INFORMATION COLLECTION

Client Name _____

Company Name _____

Date of Interview _____

Family/ Landscape User Information:

- Names, genders, ages, physical limitations or other health issues that affect use of the landscape?
- Number of resident users of the landscape and number of periodic users such as grandchildren or extended family members?
- Pets: Number, breeds, sizes, and are they indoor or outdoor pets?
- What is the family's attitude about pet confinement?
- Total number of cars in the family / users?
- Adequacy of the current parking spaces?
- Hobbies or special interests of the family members / landscape users?
- What level of privacy is desired?

Social Information:

- Who will be primarily using the landscape? Family? Public?
- What level of social interaction occurs with the neighbors of adjacent properties?
- What is the primary use of the landscape? Social or Business?
- What do family/ landscape users enjoy doing in the outdoors?
- How much time do they anticipate spending in the landscape on a daily basis? Time of day?
- Do they want the landscape to meet and match the neighborhood standard or surpass it?
- How long do they anticipate living here / owning the property and using the landscape?

Landscape Information:

- What activities will occur in the landscape? (See examples below, add additional activities if needed)

_____ Grilling	_____ Wood Storage	_____ Swimming
_____ Conversation	_____ Dancing	_____ Kayaking
_____ Lawn Games	_____ Concerts	_____ Camping
_____ Hobby Activity	_____ Basketball	_____ Parking Lot
_____ Pet Housing	_____ Baseball	_____ Dining
_____ Clothes Drying	_____ Football	_____ Client Meetings
_____ Greenhouse	_____ Track and Field	_____ Workspace
_____ Gardening	_____ Tennis	_____ Other:
_____ Fire Pit	_____ Golf	_____ Other:
_____ Hot Tub	_____ Bird Watching	_____ Other:
_____ Child's Play	_____ Hiking	_____ Other:

- What maintenance of the landscape will be done by the clients and what will be done by someone hired?
- Are cut flowers, herbs and / or vegetables desired for the house or business?
- Is night lighting desired? Is security lighting desired?
- Do they have any color, material, texture or style preferences?
- Is a water feature desired? Do they have something specific in mind? How is water procured?
- Is there something on or off-site that they would like highlighted or hidden by the design?
- Are insects an issue in their use of the landscape? Would they like to promote native pollinators?
- Do they have certain plants or types of plants that they like or dislike?
- Where is garbage and trash stored on the property?
- Can they provide examples of landscapes they would like to see as inspirations for their design?

SITE ANALYSIS CHECKLIST

Client Name _____

Company Name _____

Date of Interview _____

Site Feature

THE MAIN BUILDING AND OTHER STRUCTURES	Yes	No
Does the main building provide good physical linkage with the land?		
Are there windows, doors, archways, etc. that look out onto the land?		
Are there utility and / or maintenance items such as meters, hose faucets, air conditioning units, dryer vents, that need to be left accessible?		
Are all doors and entry ways at ground level?		
Any structures on the property scheduled for replacement, removal or major renovation?		
Do the locations of the structures create favorable or unfavorable conditions for plant growth?		
Are there any existing exterior hardscape features attached to the main building or other structures?		
Does the main building have any features that need to be emphasized or hidden by the landscape?		
NATURAL FEATURES	Yes	No
Have the existing plants been evaluated for size and condition?		
Do some of the plants require removal?		
Is the lawn acceptable in its present condition?		
Are there plants on adjacent properties that will impact the design and use of this property?		
Has a soil test been made or scheduled for this property?		
Is there evidence of poor or excessive drainage?		
Are any problem areas evident, such as low spots or eroded areas?		
If the site is sloped, does it appear problematic for human use?		
Does surface water clear the site easily?		
Does surface water runoff flow to a harmless disposal location?		
Are there strong winds that will require wind blocks for certain areas or uses of the landscape?		
Do existing trees on or off the property, or existing structures create heavily shaded areas?		
Are there any existing bodies of water on the site?		
OTHER SITE FEATURES	Yes	No
Are there utility lines above or below the property?		
Is there presently any source of night lighting such as flood lights or night security lights?		
Is there an irrigation system?		
Are existing paved areas adequate and in good condition?		
Do existing paved areas match well with the materials of the house and other structures?		
Is there a need for additional on-site parking?		
OFF-SITE FEATURES	Yes	No
Are there views from the building or land that should be incorporated into the design?		
Are there views that should be hidden or minimized by the design?		
Is there a need for greater privacy from some off-site features?		
Is there a nearby feature that should be left easily accessible?		
Is there a nearby feature that should be safe guarded against?		
Where does trash collection occur for this property?		
Are adjacent properties significantly above or below the grade of this property?		

SITE ANALYSIS CHECKLIST

Landscape Items to be Utilized in the Design

Hardscape Materials							
	Product Name and Function	Product Description	Color	Texture	Size	Unit Sold By	Cost per Unit
1							
2							
3							
4							
5							
6							
7							

Water Feature							
	Product Name and Function	Product Description	Color	Texture	Size	Unit Sold By	Cost per Unit
1							

Turf grass and Mulch							
	Product Name and Function	Product Description	Color	Texture	Size	Unit Sold By	Cost per Unit
1							
2							

Prepared by: _____

[illegible]

Description	Quantity	Unit	Material Cost	Installation Cost	Total Plant Cost	Cost +35%
Total Plant Material Cost						

II. Construction Materials (Hardscapes / Water Features)

Description	Quantity	Unit	Material Cost	Installation Cost	Total Cost	Cost +35%
Total Construction Material Cost						

III. Turfgrass and Mulches

Description	Quantity	Unit	Material	Installation	Total Cost	Cost +35%
			Cost	Cost		
Total Turfgrass and Mulch Cost						

IV. Total Cost of All Materials and Installation (See Note 8)

V. Contingency Allowance (See Note 9)

VI. Fee for Landscape Design Services (See Note 10)

VII. Total Cost For Complete Landscape Development (See Note 11)

Notes

- (1) Plant Description in terms of size at installation and root form: BR - bare root, CT - container, B&B - balled and burlapped.
- (2) Quantity is the number of separate plants to be used in the design.
- (3) Unit is measurement used to count items: SY -square yard, SF -square feet, CY -cubic yard, CF -cubic feet, LF -linear feet, EA -each.
- (4) Material cost is the cost of one unit
- (5) Installation cost is the charge for labor and any equipment needed to install one unit.
- (6) Total cost is the sum of material cost and installation cost for one unit multiplied by the quantity of units.
- (7) A 35% allowance for overhead and profit is added to each product sold. (Multiple total cost by 1.35)
- (8) Total cost is obtained by adding the subcategory totals.
- (9) The contingency is taken as 10% of total costs calculated in IV.
- (10) The design fee is charged as 12% of total costs calculated in IV.
- (11) Calculated by adding Total Cost of Materials, Contingency and Design Fee.