

LANDSCAPING

Site Analysis Checklist

WHAT A SITE ANALYSIS CHECKLIST IS USED FOR:

A site analysis checklist systematically evaluates a project site before starting work. By conducting a thorough site analysis, landscapers can identify potential challenges, assess critical factors, and make informed decisions to ensure project success.



EVERY SITE ANALYSIS CHECKLIST SHOULD INCLUDE:

TERRAIN & SOIL EVALUATION:

Identifies topographical features and soil composition.

CLIMATE & MICROCLIMATE FACTORS:

Helps determine sun exposure, wind patterns, and weather conditions.

CLIENT PREFERENCES & REGULATORY COMPLIANCE:

Ensures the landscaping plan aligns with client requirements and legal regulations.

DOWNLOAD THE TEMPLATE:

This Landscaping Site Analysis Checklist will guide you through the detailed process of evaluating your project site. It covers all necessary factors—from topography to client preferences—before breaking ground. Streamline your site analysis process, improve planning accuracy, and avoid costly errors in your landscaping projects with a site analysis checklist.

HOW TO USE THE CHECKLIST

This checklist will help you conduct a thorough and efficient site analysis before starting any landscaping project. As you review each section, note specific conditions or requirements for your site.

Use the checklist as a guide to ensure that all critical factors—such as topography, soil quality, and client preferences—are considered during the planning phase.

Completing this checklist will help you avoid costly mistakes, improve project efficiency, and set a strong foundation for success.

TOPOGRAPHY & TERRAIN

1. TERRAIN ASSESSMENT

Use the checklist below to evaluate the general topography of the site:

- Sloped areas identified (mild, moderate, steep)
- Flat or level areas suitable for specific landscape features
- Areas prone to erosion marked
- Drainage issues or water pooling locations noted
- High elevation points identified for potential water runoff
- Low-lying areas noted for drainage or flooding risks

2. SITE TERRAIN DETAILS

Fill in the table with specific details about the site's topography and terrain:

Feature	Description	Considerations
Slopes (incline/decline)	[Gentle slope on the north side with a 5% incline.]	[Consider terracing or retaining walls for planting stability.]
Drainage problem areas	[Water pools in the southeast corner after heavy rainfall.]	[Install a French drain or grading to redirect water flow.]
Erosion-prone areas		
Natural high points		
Natural low points		
Existing pathways or roads		
Potential areas for leveling		

3. SITE MODIFICATIONS

Use this section to check off and describe any necessary terrain modifications:

- Grading is needed to create level surfaces for landscaping
- Drainage solutions required for problem areas (e.g., French drains, retention basins)
- Retaining walls or barriers required to prevent erosion
- Soil stabilization measures for steep slopes
- Pathways or access points to be built or improved

MICROCLIMATE

1. MICROCLIMATE FACTORS

Use the checklist below to assess the microclimate conditions that may impact landscaping decisions:

- Areas of full sun exposure identified
- Areas with partial or full shade marked
- Wind patterns or exposure to strong winds noted
- Low-lying areas with potential frost pockets recognized
- Humidity levels and their impact on plant selection are considered
- Any heat island effects from nearby structures or pavement identified

2. MICROCLIMATE CONDITIONS TABLE

Fill in the table with specific microclimate conditions affecting the site:

Condition	Location on Site	Impact on Landscaping
Sun exposure (full/partial)	[Southern side of the property, full sun all day.]	[Ideal for sun-loving plants such as lavender and ornamental grasses. May require irrigation during dry months.]
Shade areas	[Northern boundary, shaded by large trees.]	[Choose shade-tolerant plants like hostas and ferns. Consider the slower growth rate of plants in this area.]
Wind exposure		
Frost pockets		
Humidity level variations		
Nearby heat-retaining areas		

3. CONSIDERATIONS FOR PLANT SELECTION

Use this checklist to ensure that microclimate factors are influencing plant selection appropriately:

- Plants selected for full-sun or shaded areas based on exposure
- Windbreaks considered for windy areas
- Frost-resistant plants chosen for frost-prone zones
- Drought-tolerant plants are considered for areas with high heat exposure
- Humidity-tolerant or sensitive plants chosen as needed

EXISTING VEGETATION

1. VEGETATION INVENTORY

Use the checklist below to assess and categorize the existing vegetation on the site:

- Trees identified (size, health, species)
- Shrubs and smaller plants cataloged
- Invasive or unwanted plant species noted
- Plant health and vitality assessed
- Opportunities to preserve mature trees or plants recognized
- The potential for transplanting or removing vegetation is considered

2. EXISTING VEGETATION TABLE

Fill in the table with specific details about the existing vegetation on the site:

Plant Type	Species	Size	Condition	Action
Trees	[Oak, pine, maple, etc.]	[diameter in feet]	[healthy, moderately healthy, poor, diseased, etc]	[prune, preserve, remove, transplant]
Shrubs				
Ground Cover				
Invasive Species				

3. VEGETATION MANAGEMENT PLAN

Check off the necessary steps to manage the existing vegetation:

- Preservation plan developed for mature trees and valuable plants
- Removal strategy in place for unwanted or invasive species
- Transplant plan for plants that can be relocated
- Pruning or health improvement measures identified for existing trees or shrubs
- Mulching, fertilizing, or soil amendment recommendations made for plant health

CLIMATE & WEATHER CONDITIONS

1. CLIMATE ASSESSMENT

Use the checklist below to assess how local climate and weather patterns will influence the landscaping project:

- Average seasonal temperatures noted (summer, winter, etc.)
- Typical rainfall patterns and the amount recorded
- History of extreme weather events (droughts, storms, etc.) reviewed
- Frost and freeze dates determined
- Wind exposure considered for project design
- Sun exposure throughout the year was noted for key areas

2. CLIMATE AND WEATHER CONDITIONS TABLE

Fill in the table with specific details about the site's climate and weather conditions:

Condition	Details	Impact on Landscaping
Average seasonal temperatures	[Summer: 85°F, Winter: 35°F]	[Plan for heat-tolerant and frost-resistant plants]
Rainfall patterns		
Extreme weather events		
Frost dates		
Wind exposure		
Sun exposure		

3. CONSIDERATIONS FOR PROJECT DESIGN

Use the checklist to ensure climate and weather factors are incorporated into the landscaping plan:

- Heat-resistant plants chosen for areas with high summer temperatures
- Irrigation systems designed for areas with low rainfall or dry seasons
- Windbreaks or barriers planned for areas with high wind exposure
- Erosion control methods implemented for areas prone to storms or heavy rain
- Frost-tolerant plants selected for early planting season or frost-prone zones

SOIL QUALITY & COMPOSITION

1. SOIL QUALITY CHECKLIST

Use the checklist below to assess soil quality and identify any necessary amendments:

- Soil pH tested and noted (acidic, neutral, alkaline)
- Soil type identified (sand, silt, clay, loam)
- Drainage conditions evaluated (well-drained, poorly-drained)
- Soil fertility tested (presence of nutrients such as nitrogen, phosphorus, potassium)
- Compaction issues identified
- Erosion risks identified

2. SOIL COMPOSITION TABLE

Fill in the table with specific soil details and their impact on the landscaping project:

Soil Type	pH Level	Drainage	Fertility (NPK levels)	Action (Amend, Improve, Leave)
Loam	[6.5 (slightly acidic)]	[Well-drained]	[Moderate (N 10, P 5, K 7)]	[Amend with organic compost to improve fertility]
Clay				
Sandy				
Silt				
Compacted Loam				

3. SOIL IMPROVEMENT PLAN

Check off the necessary steps for improving soil quality:

- Add organic matter (compost, manure) to improve fertility
- Add sand or gypsum to improve drainage in clay soils
- Apply lime or sulfur to adjust soil pH as needed
- Implement erosion control measures (mulching, cover crops) for vulnerable areas
- Consider raised beds or terracing for areas with poor soil

UTILITIES & INFRASTRUCTURE

1. UTILITIES & INFRASTRUCTURE CHECKLIST

Use the checklist below to identify existing utilities and infrastructure that may impact the landscaping project:

- Underground utilities located (gas, water, electrical lines)
- Overhead utilities identified (power lines, telephone poles)
- Existing irrigation systems assessed
- Access points for water, electricity, and gas noted
- Existing structures (buildings, fences, walls) mapped
- Hardscaping elements (driveways, patios, walkways) reviewed
- Any septic systems, wells, or tanks noted

2. UTILITIES & INFRASTRUCTURE TABLE

Fill in the table with specific details about the site's utilities and infrastructure:

Utility/Structure	Location on Site	Condition	Action
Underground water line	[North side near driveway, front yard, etc.]	[Good, Functional, Needs Repair, Outdated, Etc.]	[Leave, Modify, Repair, Remove]
Overhead power lines			
Existing irrigation system			
Brick wall			
Septic tank			

3. UTILITIES & INFRASTRUCTURE CONSIDERATIONS

Use this checklist to ensure that utilities and infrastructure are properly integrated into the landscaping plan:

- Plan designed to avoid underground utilities during excavation
- Landscaping elements positioned to avoid interference with overhead utilities
- Existing irrigation systems are updated or replaced as necessary
- New structures and features placed around existing utilities to prevent damage
- Access points for water, gas, or electricity integrated into the design
- Structures like walls or fences repaired or removed if needed

WATER SOURCES

1. WATER SOURCE CHECKLIST

Use the checklist below to evaluate the availability and condition of water sources on the site:

- Municipal water access points are located
- Natural water sources identified (streams, ponds, lakes)
- Existing wells or boreholes assessed
- Irrigation systems evaluated for efficiency and coverage
- Drainage issues or water retention areas noted
- Watering needs for plants and turf areas are considered

2. WATER SOURCES TABLE

Fill in the table with specific details about the site's water sources:

Water Source	Location on Site	Condition	Action
Municipal water line	[East side near the street, northwest corner, etc.]	[Functional, Needs cleaning, Low water yield, Outdated, etc.]	[Use, Improve, Modify, Repair, etc.]
Natural pond			
Well			
Irrigation system			
Drainage ditch			

3. WATER MANAGEMENT CONSIDERATIONS

Use the checklist to ensure water sources are properly incorporated into the landscaping design:

- Efficient irrigation system planned to optimize water usage
- Natural water sources integrated into design (ponds, streams)
- Drainage systems developed to prevent waterlogging or flooding
- Water conservation measures (rainwater harvesting, drought-tolerant plants) considered
- Plans developed to ensure access to water sources for maintenance and plant care

ACCESSIBILITY & TRAFFIC FLOW

1. ACCESSIBILITY & TRAFFIC FLOW CHECKLIST

Use the checklist below to assess how people and equipment will move through the site:

- Site access points identified for vehicles and equipment
- Pedestrian paths and walkways planned or noted
- Potential bottlenecks or restricted areas identified
- Delivery or service vehicle access is considered
- Parking areas for workers and visitors are noted
- Accessibility features for ADA compliance evaluated
- Site navigation and signage need review

2. ACCESSIBILITY & TRAFFIC FLOW TABLE

Fill in the table with specific details about accessibility and traffic flow on the site:

Feature	Location on Site	Condition	Action
Main vehicle access	[Front entrance, east side, near main entrance, etc.]	[Narrow, Good, Limited, None, Lacking, etc.]	[Improve, Add, Repair, Leave]
Pedestrian walkways			
Service vehicle parking area			
ADA-accessible path			
Signage for site navigation			

3. TRAFFIC FLOW CONSIDERATIONS

Use this checklist to ensure accessibility and traffic flow are adequately integrated into the landscaping plan:

- Clear, unobstructed access for equipment and vehicles maintained
- Pedestrian paths designed for safety and ease of movement
- Delivery and service vehicle access planned without disrupting landscaping work
- ADA-compliant access incorporated where necessary
- Adequate parking and space for staging materials included
- Signage and navigation aids planned to ensure smooth traffic flow on-site

CLIENT PREFERENCES & REQUIREMENTS

1. CLIENT PREFERENCES CHECKLIST

Use the checklist below to document the client's specific preferences and requirements for the project:

- Preferred design style (formal, modern, natural, etc.) noted
- Specific plant types or materials requested by the client
- Desired features (patio, pond, outdoor kitchen, etc.) identified
- Budget limitations or restrictions discussed
- Maintenance preferences (low maintenance vs. high maintenance) addressed
- Privacy and noise concerns are considered
- Specific views to be highlighted or blocked reviewed

2. CLIENT PREFERENCES TABLE

Fill in the table with specific details about accessibility and traffic flow on the site:

Preference/Requirement	Details	Action (Incorporate, Adjust, Propose Alternatives)
Design style	[Natural, rustic]	[Incorporate into the overall design]
Specific plants	[Native wildflowers]	[Propose planting in garden beds]
Desired features	[Water feature (small pond)]	[Incorporate into central design, near patio]
Budget limitations	[\$50,000]	[Adjust plant selection and material choices]
Privacy concerns	[Block view of neighboring property]	[Propose installation of privacy hedges]

3. CLIENT REQUIREMENTS CONSIDERATIONS

Use this checklist to ensure client preferences are fully integrated into the landscaping plan:

- Design style reflected in plant choices, materials, and layout
- Desired features incorporated into the final design
- Budget constraints respected throughout the project plan
- Privacy and noise concerns addressed with strategic plantings or structures
- Maintenance preferences considered in plant and material selection

ZONING & REGULATORY FACTORS

1. ZONING & REGULATORY CHECKLIST

Use the checklist below to ensure compliance with local zoning laws and regulations:

- Zoning restrictions (residential, commercial, agricultural) reviewed
- Setback requirements noted for structures or plantings
- Permits required for landscaping or construction identified
- Environmental regulations (wetlands, protected species, etc.) reviewed
- Easements and rights of way identified
- Noise, lighting, or pollution ordinances considered
- Safety and accessibility regulations for public spaces evaluated

2. ZONING & REGULATORY FACTORS TABLE

Fill in the table with specific zoning and regulatory details:

Regulation/Requirement	Details	Action
Zoning restrictions	[Residential, single-family]	[Comply, Adjust, Apply for permits, Comply]
Setback requirements	[10 ft from the property line]	
Required permits	[Water feature construction]	
Environmental regulations	[Wetlands protection on site]	
Easements	[5 ft utility easement on the west side]	

3. REGULATORY CONSIDERATIONS

Use this checklist to ensure all zoning and regulatory factors are integrated into the landscaping plan:

- The design complies with local zoning restrictions
- Setback requirements are respected for all structures and plantings
- All necessary permits applied for in advance
- Environmental regulations and protections incorporated into the design
- Easements and rights-of-way left clear of obstructions
- Safety and accessibility regulations followed for public areas

LAND USE

1. LAND USE CHECKLIST

Use the checklist below to assess the current and planned use of the land:

- Current land use documented (residential, commercial, agricultural, etc.)
- Historical land use reviewed for potential impacts (previous industrial, agricultural use, etc.)
- Future land use plans considered (rezoning, development, etc.)
- Restrictions on land use identified (conservation areas, protected lands)
- Nearby land use considered (parks, industrial areas, schools, etc.)
- Potential for land use conflicts (noise, pollution, traffic) assessed

2. LAND USE TABLE

Fill in the table with specific land use details:

Land Use Factor	Details	Action
Current land use	[Residential]	[Consider, Adjust, Test, Research]
Historical land use	[Former agricultural use (fertilizer)]	
Future land use plans	[Potential rezoning to commercial]	
Nearby land use	[Park and recreation area to the west]	
Land use restrictions	[Protected wetland on northern boundary]	

3. LAND USE CONSIDERATIONS

Use the checklist to ensure land use factors are fully integrated into the landscaping plan:

- Current land use reflected in plant, material, and design choices
- Historical land use assessed for any environmental or soil impacts
- Future development plans considered to ensure the long-term viability of the project
- Nearby land uses (residential, commercial, etc.) taken into account for noise, privacy, and aesthetics
- Any land use restrictions respected, with appropriate adjustments to the design

FINAL REVIEW AND SITE SUMMARY

1. SITE SUMMARY CHECKLIST

Use the checklist below to review and summarize key findings from the site analysis:

- Topography and terrain issues identified and addressed
- Microclimate conditions evaluated and factored into the design
- Existing vegetation was cataloged, and a management plan was created
- Climate and weather conditions considered for plant and material selection
- Soil quality and composition tested, with amendments planned
- Utilities and infrastructure mapped and accommodated in the design
- Water sources were evaluated, and irrigation plans were developed
- Accessibility and traffic flow incorporated into the site layout
- Client preferences and requirements reflected in the project plan
- Zoning, regulatory factors, and permits addressed
- Land use factors evaluated for current and future impacts

2. SITE SUMMARY TABLE

Fill in the table to provide a quick overview of the most important findings from the site analysis:

Factor	Key Findings	Action Taken
Topography & Terrain	[Sloped areas on the north side; drainage needed]	[Grading and drainage solutions incorporated]
Microclimate	[Wind exposure in the west; shaded areas on the east]	[Windbreak planned; shade-tolerant plants selected]
Existing Vegetation		
Soil Quality & Composition		
Water Sources		
Utilities & Infrastructure		
Accessibility & Traffic Flow		
Client Preferences		
Zoning & Regulatory		
Land Use		

NEXT STEPS

Outline the next steps for moving the project forward:

- Review all site analysis findings with the client for final approval
- Obtain any necessary permits for construction or landscaping work
- Finalize the project plan based on site analysis and client feedback
- Schedule and prepare the site for grading, excavation, and initial work

NOTES

Use this space to record any additional observations or considerations that may not have been covered in the previous sections:

- **Notes:**

- _____
- _____
- _____
- _____

ACTION ITEMS

List any specific tasks or next steps that need to be taken based on the site analysis findings:

Action Items:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

CLIENT APPROVAL

Once the site analysis has been completed and reviewed, use this section to confirm client approval before proceeding with the project:

- **Client Name:** _____
- **Project Name/Location:** _____
- **Approval Statement:** I have reviewed the site analysis and approve the findings and recommendations outlined in this document. I understand that any necessary changes will be communicated and agreed upon before work begins.
- **Client Signature:** _____
Date: _____
- **Contractor/Project Manager Signature:** _____
Date: _____