



INITIAL CONSULTATION WORKSHEET RESIDENTIAL PROJECT

CONTACT DETAILS:

Full Name: _____

Mailing Address _____

STREET/PO BOX

CITY

STATE

ZIP

Telephone No: _____ (H) _____ (W)

Mobile/Pager: _____ Fax Number: _____

E-mail Address: _____

Spouse (Name) _____

Children: Yes No

WORK DETAILS

Company Address _____

STREET/PO BOX

CITY

STATE

ZIP

Other _____

PROJECT INFORMATION

Project Type _____

Name _____

Location _____

DESIGN ASPECTS

• Suggestion _____

• Schedule _____

• Special Needs / Requests _____

• Budget Guidelines _____

DESIGN DETAILS



REQUESTED SERVICES

_____ Provide design consultation or design charette directly with client and/or other design team members.

_____ Coordinate and obtain proposals from other consultants and/or contractors. For example the consultants may include surveyors, architects, structural engineers, civil engineers, irrigation consultants, and/or lighting designers. Contractors may include arborists, landscape contractors, pool contractors, masons, electricians, irrigation contractors and/or plumbers. Depending on the level of detail and project scope desired of the client, a survey of existing topography, trees and property boundary may be necessary. The services of others may not be known until after completion of the schematic design stage.

_____ Survey and/or field measure existing site conditions as necessary in order to prepare accurate plans to scale. This will be required at a minimum in addition to a survey provided by others.

_____ Prepare plans that are rendered schematic design options to stimulate discussions and build consensus. These may include section, elevation, perspective and plan views.

_____ Prepare a single schematic site plan that represents our best understanding of the client's concerns and design solutions. This plan may be in black and white or in color.

_____ Obtain samples of materials for approval prior to completion of detail drawings

_____ Prepare a magnitude cost estimate of landscape improvements proposed at the schematic design stage.

_____ Prepare construction drawings or plans that are adequately detailed to obtain apples to apples pricing from contractors.

_____ Prepare hardscape plans which include things like paving, walls, steps, lighting, fencing, pergolas, trellises, arbors, gazebos, driveways, sidewalks, terraces, piers, seat walls, ponds, waterfalls etc.

_____ Prepare softscape plans which include specifications for all plant materials including trees, shrubs, perennials, groundcovers, grasses, bulbs, tubers, vines and annuals.

_____ Prepare updated magnitude cost estimates for landscape improvements proposed at the construction drawing stage.

_____ Specify site amenities such as containers, garden ornament, outdoor furniture, light fixtures, sculptures and garden art.

_____ Sell site amenities directly to the client or specify only for purchase directly by owner or others.

_____ Provide construction period services during the construction phase that will ensure compliance with the construction documents by the landscape and/or other contractors. This may also include site visits and site inspections as much as a year after the project is complete.