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| **Preliminary Client Questionnaire** | |
| *Our Preliminary Client Questionnaire is designed to familiarize ‘us’ with your site and goals, so that we can deliver the highest quality of service possible to you, the customer. Please fill out this document to the best of your ability, so that we can hit the ground running on our Site Assessment and Preliminary Concepts phases. Please do not worry if you have trouble finding answers or files that we request. Just fill in the boxes and info to the best of your ability with the time you have available. We can work with you to complete the picture, but the information that you do provide us will be of huge help in saving you time and money and allowing us to be more effective in our service delivery. Thank you!* | |
| 1. **Context: Site, People, and Bios** | |
| Name Contact info - |  |
| **Brief Bio**  For each team member, provide a resume or background   * Experience * Skills |  |
| **Project Overview** |  |
| **Stakeholders and Decision Makers**  Who are the primary decision-makers?  Who are the financial decision makers? |  |
| Are there any other stakeholders who will influence site planning? |  |
| **2. Goals Articulation** | |
| Dreams and Desires  What is your vision for 10 years down the road, 20 yrs? A description of your project’s essence? What needs to be improved as a result of this project? What does your ideal on- and off-site lifestyle look like? What values are important to you?  Your personal values are quite important. |  |
| **Uses and Outcomes**  What are your desired uses of the property?  What do you need to produce to create and maintain the quality of life you want?  What larger outcome is this part of? How does it fit into who you are and your major beliefs and values? |  |
| **Goals and Concerns**  Rank some of your desired design criteria for your project  Detail other goals and concerns you have | 1=Not Important 5=Very Important  Revenue Generation 1 2 3 4 5  Food Production 1 2 3 4 5  Low Maintenance 1 2 3 4 5  Water Savings 1 2 3 4 5  Energy Savings 1 2 3 4 5  Profit 1 2 3 4 5  Others (add anything important to you)  1 2 3 4 5 |
| **Aesthetics**  What are your general aesthetic preferences: wild, neat and tidy, rows, rounded, easy access, etc.? (photos of examples are a great aid for this) Be specific. The better you understand how your goal will look, sound, and feel, the more likely we can make it exactly what you want |  |
| **Challenges**  What do you anticipate being your biggest challenge or design constraint for the project? |  |
| **Consultant’s Role**  What were you hoping we could do for you with this consultancy? |  |
| **3. Budget, Labor, and Time Allocation** | |
| **Budget**  How much are you willing to invest over the next year to meet your goals? For install? For maintenance? Year 1-2, Year 3-5, On-going? |  |
| **Financing**  Will you require financing for your project? Do you have a business plan, a presentation, and offering documents prepared? Do you need debt, equity, or both? |  |
| **Revenue**  [ For Commercial ] - *Sales & Marketing Strategy* - Where do you anticipate selling your products? Do you have a marketing strategy? Have you decided which enterprises you want to develop? |  |
| **Labor**  How much labor would you prefer to do?  What types of labor for install and maintenance would you prefer to be doing?  How many people will work on the site?  All year round or seasonal? Full-time or part-time?  Do you anticipate doing most or all of the work yourself, or hiring staff / contractors?  *Please differentiate between implementation and maintenance phases of the project.* |  |
| **Timeline**  What are your priorities? What are your immediacy needs? For starting? For finishing?  Do you have a rough timeline for the development of your property/enterprise? Are there any key milestones that you have identified already? |  |
| **4. Site Characteristics and Info** | |
| **Water**  What are your current water sources? Are they reliable (municipal water, well, tanks, etc..)?  Are there any springs or creeks on the property? If you have any of these, please share: Well drilling logs, water quality tests, water quantity tests, water rights documents, other info about on-site water. |  |
| Are you aware of any drainage or erosion problems? |  |
| Do you know where your septic tanks and leach field are or where your sewer lines cross? |  |
| **General Site Info**  What is the size of the property? |  |
| What do you like about your property as it currently exists? What are its main selling features? What must stay as is? |  |
| What would you like to change about your property down the road? |  |
| What are your primary concerns about the site? Re: wildlife, fire, flood, drought, trespassing, privacy, etc. |  |
| Are you aware of the land use history? Logging, farming, pasture, etc.? |  |
| What kinds of places surround your site? |  |
| **Site Inventory**  Please list and share any maps or other detailed site info you have |  |
| Describe your current 'resource base'.  Examples include: buildings, tractors, barns, ponds, greenhouse, gardening knowledge, time, money, willingness to learn, etc... (Anything you consider to be an impactful 'resource' or 'asset' in your planning) |  |
| What design elements, infrastructure and site capital are you considering adding at this point? Examples includes: buildings, equipment, hoop-houses, greenhouses, ponds, barns, sheds, orchards, rainwater tanks, fencing, etc.. |  |
| How are you currently powering or using energy on your site? Do you have a map of site utilities or know where they are? |  |
| Have you done soil tests? | Please share if so. |
| **Site Use**  What is your daily routine? Weekend? Seasonal? |  |
| What structures do you have and use the most for what purposes? |  |
| How do you use areas of your site presently?  How might these uses change in the future (family and employment changes)? |  |
| Do you have/want livestock? What kinds and how many of each? How do you want to approach wildlife and varmints? |  |
| **5. Miscellaneous and Extras** | |
| Any other concerns, questions, comments, or important information?  Do you have any ‘Must haves’ or ‘Absolutely nots’?  Please provide any other information you believe will help us serve you.  A list of specific questions is very helpful. How do you do this? Will that grow there? etc… With this due diligence we'll have a good idea of the direction(s) we should take when we work to marry the site with your dreams, goals and objectives.... |  |