Whole Systems Site Assessment and Analysis

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Client Profile	
Name:	Email:
Address:	Phone: ()
• Property Size:	
• Occupation:	
Amount of time available for maintaining p	roperty
• Financial: Budget for implementation	
• Lifestyle	
• Number of people living on site, ages and co	ultural background:
• Vehicle preference and needs: car/truck: fa	rm equipment, recreational equip
• Special requirements: events / needs / hob	bies
• Allergies:	
• How long do you plan to live at this site?	
Client Needs Assessment	
Prioritize goals, primary concern: Functiona	l objectives, phase planning (list)
• The wish list:	
Water: source, drinking, irrigation, storage,	amount needed for site goals
- water. Source, armking, irrigation, storage,	amount needed for site godis

Structures: Existing or Planned		
- House (type of heat, appropriate technology)		
- Greenhouse		
- Shop/barns		
- Chicken house and other animal needs		
- Other out buildings		
• Utility areas:		
- Clothesline,		
- Recycle and trash		
- Wood		
- Service equipment		
• Children's special areas		
• Level of food self-reliance (present and future): diet and taste preferences		
- Vegetables, herbs, berries, orchards, nuts, herbs, etc.		
• Income production from property: ie: market gardens, animals, woodlot, crafts, education center		
Compost and recycling: Interest and Experience		
• Livestock:		
- Current		
- Future		
• Pets:		
- Current		
- Future		

• Lighting: paths, buildings

• Wildlife enha	ancement: Where: upland, lowland, riparian
• Woodlot:	
• Earth moving	g equipment needed: ie: pond building, structures
Site overview	<i>r</i> :
1. Plans and dr	awing:
	a. Existing site drawings, aerial photos, contour maps, legal description, land survey (always
	recheck all maps for accuracy)
2. Existing:	a. Eco-systems, structures, fences, pathways, sacred sites
	b. History: logged, cropped, pastured, sprayed
	c. Talk with neighbors, research county records, soil conservation service
3. Known chall	enges on-site:
	a. Water
	b. Topography
	c. Erosion
	d. Noise: rail, aircraft, highway, neighbors
	e. Visual pollution
	f. Unpleasant odors or other off-site nuisance, such as: dust, privacy concerns
	g. Time and money
4. Location for	<u>:</u>
	a. Plants, animals
	b. Structures: ease of access and for excavation, foundation strength,
	depth of bedrock, depth to water table
	c. Wells: depth to water, rock porosity and permeability, pollution potential
	d. Septic: depth of bedrock, depth to water table, drainage characteristics of soil
	e. Food storage
5. Fnergy	

- J. LIICISY
- a. Wind direction and velocity (monthly)
- b. Number of sunny and cloudy days
- c. Solar access obstructions

- d. Stream gradient: from top to bottom
- e. Other potential energy sources biomass, geothermal, methane

6. Resources: on/off site

- a. Natural features: springs, sunken areas, woodland, minerals, timber, sand deposits in creek, stones for building
- b. Edibles: native fruits and berries, fish
- c. Sources of biomass: on and off the property
- d. Views: good and not so good
- e. Sawmill, factories, dump, plant and seed sources

7. Zoning

- a. Local governments
- b. Previous land use

8. Legal Constraints

- a. Restrictions on use covenants
- b. Property lines
- c. Easements: buildings, roads, access
- d. Water rights

9. Access

- a. Existing roads, fences
- b. New roads required and potential cost: to structure(s), fields, other

10. Utilities

- a. Electricity, gas, water (well or district), telephone, sewage
- b. Locate existing utility lines, water lines, sewer and septic

11. Community Land Use

- a. What is going on upstream and over the fence (toxic sprays, cattle in creeks, etc.)
- b. Economic and emotional health of community
- c. Schools, public transit, hospitals, fire department, landfill/dump, shops

Environmental Analysis

12. Aspect

- a. Solar access: South/Southwest preferred
- b. Hot/warm summer slopes
- c. Cool summer slopes

13. Climate

- a. Light availability and seasonal patterns of movement: sun, rain, clouds, fog
- b. Temperature: average high and low temps. (hardiness zone)
- c. Average rainfall: yearly and monthly
- d. Frost: average dates, extreme first and last dates, pockets
- e. Hail: timing, frequency, direction
- f. Storms: timing, frequency, direction
- g. Micro climate(s)
- h. Air drainage
- i. Altitude and latitude

14. Wind

- a. Wind direction, access, drains, thermal's, chills
- b. Damaging or desirable winter winds (assess velocity)
- c. Cooling breezes

15 Hydrology

- a. Water quality
- b. Existing water rights and resources -note potential water rights
- c. Surface water and level of water table year round and seasonal
- d. Drainage patterns
- e. Springs creeks, streams, ponds (permanence)
- f. Catchment size type- depth of well
- g. Flood levels--100 year flood

16. Soils and Geology

- a. Geology and conservation maps (government maps)
- b. Soil type: clay, loam, sand
- c. Soil tests pH, nitrogen, phosphorus, potassium, and other major and minor elements and minerals, salinity
- d. Drainage and absorption

- e. Soil depth (depth of hardpan), organic content
- f. Stability of site
- g. Maximum depth of frost
- h. History of use

17. Topography

- a. Landforms: elevation, significant rock formations, landmarks
- b. Contour maps or field survey
- c. Identify keylines, valleys and ridges
- d. Determine slope gradient (degree of slope) either severe, moderate, minor, or percent grade

18. Natural disasters:

a. Fire, flood, frost, lava flows, cyclones (timing and direction)

Plants and Animals

19. Vegetation (Flora)

- a. Identification of existing plants and their vigor
 Note location, guilds, species, height, and width, noxious, and/or poisonous
- b. Forests type, age, condition, value
- c. Density
- d. Exotic species present
- e. Plants to be cultivated: vegetables, fruits, berries, nuts, natives, exotic's, woodlot
- f. Plant list and how they are used
- g. List of seeds wanting to save

20. Animals (Fauna)

- a. Domestic: primary use, food, manure, grazing
- b. Water foul and native birds nests and dropping's
- c. Aquaculture
- d. Native animals of concern (cougar, bear, snakes)
- Points of Concern:

• Additional Information regarding decisions to be made: