Home Landscape Planning Worksheet:  
12 steps to a functional design

This worksheet will guide you through the process of designing a functional landscape plan. The process includes these steps:

- Gather information about the site and who will use it.
- Prioritize needs and wants.
- Consider maintenance requirements.
- Determine a budget.
- Organize the landscape space.
- Determine the shape of the spaces and how they relate to each other.
- Select the plants that will fill the landscape.

Gather information

Step 1. Make a scale drawing
Landscape designs are generally drawn from a bird's-eye view in what designers call “plan view.” To prepare a base map (scale drawing) of your property use graph paper and let one square equal a certain number of feet (e.g. 1 square = 2 feet), or draw it to scale using a ruler or scale (e.g. 1 inch = 8 feet).

The base map should include these features:
- Scale used
- North directional arrow
- Property lines

You may want to make several photocopies of this base map to use for the following steps in the design process.

Step 2. Site analysis
A thorough site analysis tells you what you have to work with on the property. Part 1 of the “Home Landscape Questionnaire” (see insert) includes questions that should be answered when completing a site analysis.

Lay a piece of tracing paper over the base map and draw the information gathered during the site analysis. This layer should include these features:

- Basic drainage patterns (use an arrow to show direction of surface water flow or poor drainage areas)

- Location of existing landscape features: house, garage, other buildings, trees, walks, and driveways

- Doors, windows, porches, and different rooms of the house

- Septic tank, sewer lines, or underground power lines

- Views (point arrows in the direction of each good view; also indicate views that need screening)

- Undesirable features of the property or of adjoining property
**Step 3. Prioritize landscape needs and wants**

Once you know the physical attributes of your site you can start to determine and prioritize your landscape needs and wants using part 2 of the “Home Landscape Questionnaire.” Thinking about your current and future needs and wants will help you maximize the landscape’s usefulness over several years.

**Step 4. Consider maintenance requirements**

All landscapes require maintenance. Knowing how much time and money you are willing to spend on maintenance will influence your major design decisions. Thoughtful design combined with low maintenance plants and hardscapes (patios, walkways, etc.) can greatly reduce time spent on maintenance; try these suggestions, for example:

- Avoid lawn areas with angles of 90° or less—they are difficult to mow
- Include more trees and shrubs than annual and perennial flowers—they require less care
- Apply a 3- to 4-inch layer of mulch in planting beds — it helps prevent weed growth

**Step 5. Determine a budget**

The cost of a landscaping project is a combination of time and money. For large, expensive projects you may want to spread the work and cost over 3 to 5 years. Developing an overall plan for the landscape helps you focus on completing parts of the project over that period.

**Organize and define the space**

**Step 6. Identify home landscape use areas**

Just as in a home, a landscape is composed of areas that are used for different purposes. Most home landscapes have public, private, and service areas. Each should be designed to meet your needs and to create an attractive overall landscape.

**Public area**

This is most often the front yard and is the area the public sees from the street. The main purpose is to frame the house and create a visually appealing and inviting landscape. An attractive entryway or walkway to the house is a primary feature and is often surrounded by an uncluttered area of grass or another type of groundcover.

**Private or family area**

The private area is often the back yard and sometimes side yards. There should be easy access from the house to the outdoor space and features such as outdoor furniture and lighting should be considered. Privacy from neighbors also may need to be considered.

**Service and work areas**

How you plan to use the landscape will affect how large of a work area you need and where it might be located in the landscape. Screens—such as a dense planting of shrubs, a vine on a trellis, or a fence—can make the service area less noticeable when viewed from other parts of the landscape.

**Step 7. Sketch functional diagrams**

Functional diagrams are a first attempt at organizing the landscape space in a way similar to a home’s floor plan. The “use areas” described earlier are considered along with the information from part 2 of the questionnaire. To create functional diagrams, lay a piece of tracing paper over your base map and draw bubble shapes to represent the previously identified “use areas.”

As you think about different ways to organize the space, also consider how people will move from one area to another, and how people will move between the house, garage, and landscape. As you think about circulation within the landscape, consider utility locations, drainage patterns, and plant material locations. These elements may affect possible design ideas.
**Step 8. Sketch form compositions**
A form composition is created when the different bubbles from the functional diagrams are given specific shapes. For example, the bubble that represented the lawn area could be drawn as a rectangle if a rectilinear style is used, or as a kidney bean shape if a more informal curvilinear style is selected. Using a similar form throughout the design helps create unity and structure within the design.

**Step 9. Consider spatial compositions**
Spatial composition focuses on the three-dimensional outdoor space. How do the trees, shrubs, low-growing plants, and hardscapes combine to make the ceilings, walls, and floors of outdoor rooms? The choices of plants and materials influence how the landscape looks and "feels." For example, trees with a tall, loose canopy create a sense of openness, while a tree with a dense and relatively low branching canopy creates a sense of enclosure.

**Step 10. Create a preliminary design**
This step allows you to convert the loose, freehand bubble diagrams and form compositions into a more refined, but still preliminary, design. The space is clearly organized, the outdoor rooms become obvious, and masses of plants are illustrated and characterized.

**Refine the preliminary design**
As you move into the final step of the design process, begin drawing landscape symbols on the tracing paper to represent specific landscape elements. Don't worry about selecting individual plants, a label of "deciduous tree" or a mass representing "perennials" is sufficient. Specific plants are decided in the final step.

**Key Description**

1. Shade Tree 7. Large Flowering Shrub
2. Evergreen Tree 8. Medium Flowering Shrub
4. Large Deciduous Shrub 10. Annual Bed
5. Medium Deciduous Shrub 11. Perennial Bed
6. Flowering Tree 12. Prairie Wetland

**Plant Symbols**
Use these to indicate general plant types in the preliminary design and specific plants in the final plan.

**Deciduous symbols**

**Evergreen symbols**

**Ground cover symbol**

After you have developed a final draft, take time to refer back to your earlier notes, site analysis, and landscape questionnaire. Think carefully about the design and how it will meet your needs.
### Step 11. Select plants

Now is the time to select specific plants and use landscape symbols to represent them. These symbols need to be drawn to scale and should represent the mature spread of the plant. For example, if you are using a scale of 1 inch = 8 feet, then a maple tree with a spread of 16 feet would be represented by a 2-inch diameter circle.

Select plants for your home landscape based on environmental requirements (hardiness level, heat zone tolerance, light, moisture, and soil requirements) and aesthetic qualities (form, texture, seasonal foliage color, flowers, fruit, bark, and mature size).

### Step 12. Draw the final landscape plan

After plants are selected it is time to refine the preliminary design further into the final plan. In addition to the landscape design, the final plan also includes a planting key. This becomes your shopping list and includes both botanical and common plant names, a number or letter abbreviation that corresponds to the plan, and quantity.

You also may want to include a column indicating the reasons for selecting each plant (white flowers, red fall fruit, fragrant blossoms, etc.). This is helpful in case a particular plant isn’t available at the nursery because it will remind you what characteristics to look for in the substituted plant.

### Resources

Check these Web sites for publications and additional information:
- ISU Extension Distribution Center
  www.extension.iastate.edu/store
- ISU Horticulture
  www.yardandgarden.extension.iastate.edu

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#### Table: Common Names and Scientific Names

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<td>13</td>
<td>Periwinkle</td>
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Analyze the site
A thorough site analysis helps you evaluate the existing landscape so you develop a plan to enhance or maintain your property’s beauty and sustainability. A comprehensive understanding of your site identifies existing light, moisture, and soil conditions. This information helps create a landscape that is easier to sustain.

Soil, slope, drainage
Describe the soil type:

- Does soil type vary in different areas of the property?
- Describe any elevation differences:
- Are retaining walls needed? Where?
- Describe any soggy areas:
- Where does water drain?

Wind
What is the prevailing wind direction in summer?

- What is the prevailing wind direction in winter?
- Are windscreens needed? Where?

House
Describe location:

- Describe the color:
- Describe the architectural style:
- Describe any unique features:
- Describe the most desirable views:
- Describe any undesirable views:

Existing Plants
Describe location and condition of existing trees and shrubs:

- Describe location and condition of flower and/or vegetable gardens:

Sun
Describe sun exposure in public areas:

- Describe sun exposure in private areas:
- Is summer shading needed? Where?

Other existing structures
Describe location and condition of garage and/or other buildings:

- Describe location of utilities:

Other considerations
Describe your preferred level of maintenance:

- Are sound buffers needed? Where?
- Describe other conditions that affect use of yard area:

Home Landscape Questionnaire, part 1
(Adapted from Home Landscape: Understanding the basics of landscape design, PM 2004. Copies available from www.extension.iastate.edu/store)
This CHECKLIST will help you note important information during your site analysis.

___ Scale selected
___ Wells, cisterns
___ North arrow
___ Other buildings
___ House drawn in
___ Doors, windows
___ Good views
___ Bad views
___ Roads, drives
___ Existing trees
___ Walks
___ Existing shrubs
___ Sewer lines
___ Banks, slopes
___ Septic tank
___ Drainage
___ Water lines
___ Winter winds
___ Power lines
___ Summer winds
___ Phone line

Attach this sheet of graph paper to a clipboard to make it easier to take notes on site.

Using a tape measure, locate all features on your site.

This graph paper has ¼ inch squares. A convenient scale would be ¼ inch = 1 foot or ¼ inch = 2 feet.
Analyze needs and wants

Answering these questions help determine how outdoor spaces are used. Identifying facts/wants/needs increases the likelihood that the resulting landscape is a success.

Yard Use

Who will use the yard?

- Adults
- Children (ages)
- Elderly
- Pets (describe)

When is the yard used?

- Spring
- Summer
- Fall
- Winter

Are you satisfied with the front door/public entry space? If not, how could it be improved?

Are you satisfied with the back door/family entry space? If not, how could it be improved?

Are you satisfied with the transition between indoor and outdoor living areas? If not, how could it be improved?

Are you satisfied with the way existing walkways connect parts of the yard? If not, how could it be improved?

Are you satisfied with the current amount and type of outdoor lighting? If not, how could it be improved?

What outdoor structures/features would you like to add?

- Patio or deck
- Shade cover for patio/deck
- Children’s play area
- Cooking/grilling area
- Fenced vegetable garden
- Raised planters
- Dog pen/run
- Storage shed
- Gazebo
- Clothesline
- Swimming pool
- Spa/hot tub
- Sculpture
- Fire pit
- Boulders
- Dry creek
- Mounds/berms
- Pond
- Bench
- Fountain
- Waterfall/stream
- Greenhouse
- Putting green
- Rain barrel
- Off-street parking
  - for guests
  - for RVs
  - for boats
- Irrigation system

Maintenance considerations

How much time do family members have for yard care?

Is hiring outside help an option?

Design considerations

What is your preferred design style?

- Formal
- Semiformal
- Informal

What themes/styles do you want reflected in your outdoor space?

- European
- Asian
- Natural
- Other

What is your preferred shape (for lawns, walkways, decks)?

- Rectangles
- 45° angles
- Circles
- Curving/free-form
- Combination
- Don’t care

What items need storage space?

- Garden equipment
- Garbage cans
- Bicycles
- Outdoor toys
- Sports equipment
- Lawn furniture/cushions
- Other

Do any family members have specific plant allergies? (List plants)

Is damage from wildlife a problem?