

# Site Assessment and Planning Checklist for New Tree Plantings

**Location** \_\_\_\_\_ Date \_\_\_\_\_  
Side of house (north, south, northeast, etc.) \_\_\_\_\_ Hardiness zone \_\_\_\_\_  
Microclimate windy \_\_\_\_\_ frost pocket \_\_\_\_\_ reflected heat \_\_\_\_\_ other \_\_\_\_\_  
Irrigation system  Y  N Supplemental irrigation  Y  N Average rainfall \_\_\_\_\_  
Light levels full sun \_\_\_\_\_ partial shade \_\_\_\_\_ full shade \_\_\_\_\_  
Are there existing trees or plantings?  Y  N  
Species \_\_\_\_\_ Size \_\_\_\_\_ Condition (good, fair, poor) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Above-Ground Space Available

Distance from other plantings & trees \_\_\_\_\_  
Distance from buildings/structures \_\_\_\_\_  
Distance from neighboring properties \_\_\_\_\_  
Overhead wires  Y  N (If so, how high?) \_\_\_\_\_

## Below-Ground Space Available

Rooting space length \_\_\_\_\_ width \_\_\_\_\_ depth \_\_\_\_\_ (It is important to dig to examine soil.)  
Are there stumps or roots from other trees or plantings?  Y  N  
Are there any below-ground utility cables or pipes?  Y  N

## Soil and Drainage

pH levels \_\_\_\_\_ Soil texture: clayey \_\_\_\_\_ loamy \_\_\_\_\_ sandy \_\_\_\_\_  
Compaction levels before planting: no compaction \_\_\_\_\_ moderate \_\_\_\_\_ severe \_\_\_\_\_  
Heavily used area with possible soil compaction after planting?  Y  N  
Drainage wet \_\_\_\_\_ well drained \_\_\_\_\_ dry \_\_\_\_\_  
Possible use of de-icing salts on site \_\_\_\_\_ possible soil erosion \_\_\_\_\_ flooding \_\_\_\_\_  
Noxious weeds \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Other Soil or Site Problems

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Installation Considerations

Access to planting site: clear path \_\_\_\_\_ gates or fences \_\_\_\_\_ (If so, how big?) \_\_\_\_\_  
Other \_\_\_\_\_  
Vehicle access \_\_\_\_\_  
Will you need to lay plywood to protect turf or soil beds? \_\_\_\_\_  
How much plywood will be needed? \_\_\_\_\_  
If only access is through a building, check door sizes and openings \_\_\_\_\_  
Will you need to add or remove soil from planting site? (If so, how much?) \_\_\_\_\_