

PROPERTY PLANNING & DESIGN CLIENT QUESTIONNAIRE

Discovery worksheet for the initial consultation and site walk

Purpose: This questionnaire helps organize the owner's goals before conceptual planning begins. If an answer is unknown, write "to be determined." Attach surveys, maps, photographs, restrictions, bids or inspiration images when available.

Client	Britta Strain
Property	88-acre property near Poolville, Texas — exact address: _____
Consultant	Sharin Hall
Meeting	Initial meeting: September 1, 2026 Site walk: September 2, 2026

1. Ownership, Land and Existing Information

Who owns the property, and who has final decision-making authority?

What documents are available? *(survey, title commitment, easements, restrictions, topography, floodplain, utility maps, soil or water reports)*

Describe all existing improvements and anything that must remain.

Are there known easements, pipelines, wetlands, flood areas, deed restrictions, setbacks or access agreements?

2. Vision and Priorities

In one paragraph, describe what you want this property to become.

List your five highest priorities in order.

What currently frustrates you about the property or proposed plan?

What must be completed first, and what can wait?

3. Horses, Livestock and Daily Operations

How many horses are on the property now, and what is the five-year maximum?

What activities must the property support? *(training, breeding, foaling, lessons, boarding, clinics, cattle, hay, events)*

Describe the daily flow for feeding, turnout, manure, equipment and emergencies.

What separation is needed among stallions, mares and foals, young horses, cattle, clients or visitors?

4. Covered Arena and Horse Facilities

Covered arena goals: *(desired dimensions, discipline, footing, roof height, lighting, ventilation, spectator area, cattle access)*

Barn requirements: *(stall count and size, runs, wash rack, tack/feed rooms, office, restroom, vet/farrier area, breeding or foaling spaces)*

Additional structures: *(round pen, walker, sheds, shop, hay storage, equipment storage, cattle pens)*

What future facilities should the first phase preserve space for?

5. Pastures, Fencing, Water and Movement

How should the acreage be divided? *(pastures, traps, dry lots, hay fields, cattle areas, private/home zone)*

Preferred fencing, gates and lane system:

Existing and proposed water sources: *(wells, ponds, tanks, automatic waterers, irrigation, fire protection)*

Describe truck, trailer, feed delivery, equipment and emergency access needs.

6. Utilities, Drainage and Site Conditions

What utilities currently serve the property, and where are they located? *(electric, water, well, septic, sewer, gas, internet)*

Known drainage, erosion, mud, wind, dust, shade or soil concerns:

Are backup power, security, cameras, gates or fire-access improvements desired?

7. Home, Guests and Lifestyle

Describe the home site, views, privacy and relationship to horse facilities.

Will clients, employees, guests or family need separate access, parking or housing?

What should visitors see first, and what should remain private?

8. Budget, Schedule and Project Team

Estimated overall budget and first-phase budget:

Desired construction start and completion dates:

Who is already on the team? *(engineer, surveyor, architect, arena/barn contractor, electrician, well/septic, fencing, lender)*

How will bids, changes and final decisions be approved?

9. Design Direction

Describe the desired appearance and materials. *(ranch style, colors, metal/wood/stone, low maintenance, brand identity)*

List properties, facilities or images that inspire you.

What do you absolutely not want?

10. Site-Walk Notes

Best building areas and views observed:

Drainage, access, utilities or safety concerns observed:

Measurements, photos and documents still needed:

Immediate decisions and next steps:

Additional Walk-Through Notes

Use this space for observations, sketches, follow-up contacts or unresolved questions.

Client Confirmation

The information above reflects the client's current goals and may be refined during discovery. It is not a survey, engineering analysis, construction document or cost estimate.

Client signature	
Date	
Consultant notes	

