Is it Time to Revisit Your Landscape Master Plan?

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Are you feeling a bit daunted by all the possible revisions, enhancements, and upgrades your landscape needs? Then a landscape master plan is the perfect tool to help you prioritize and budget for capital improvements and maintenance expenditures.

**When should a master plan be revisited?**

If you haven’t looked at your property’s master plan within the past year, now is the time to review it. If your property doesn’t have a master plan, now is the right time to start the process so you’ll reap the benefits of having the plan for your next budgeting cycle.

Late winter or spring is an excellent time to begin the plan update process. As the remnants of snow piles recede and before leaves emerge, the structural elements of the landscape are starkly visible.

**What is a landscape master plan?**

The American Society of Landscape Architects defines a master plan as: A preliminary plan showing proposed ultimate site development. Master plans often comprise site work that must be executed in phases over a long time and are thus subject to drastic modification.

“It’s helpful to think of the landscape master plan as a framework that provides a unifying vision for the property’s physical assets and also facilitates decision making and budgeting," advises Landscape Designer Christen Little of Moore Landscapes. “It provides principles for design of amenities, plantings and hardscapes, and includes strategies for phasing and implementation. A well-thought-out master plan also guides and informs landscape maintenance operations.”

**Start with assessments and analysis**

The master planning process begins with a thorough assessment of existing site conditions and an inventory of existing assets and deficiencies. Pedestrian and vehicular circulation, utilities, drainage, and environmental conditions are evaluated.

As part of the assessment phase for a master plan update, the property owner, manager, residents, tenants, and maintenance manager contribute information about current site uses, desired or necessary elements to incorporate in the new plan, budget capacity and constraints, and confirm or suggest alterations to the plan’s overall guiding principles.

“A tree inventory is an especially important element of the assessment and planning process, as it provides the foundation for the tree management plan,” comments Little. Tree inventories are conducted by horticulturalists or arborists, and document each tree’s location, species, size, caliper, condition, historical designations, maintenance needs, insect or disease issues, safety concerns, root space, and if the tree needs to be replaced. Many communities have tree ordinances that require permits for the removal and replacement of trees over a certain size so this must be accounted for in the master plan.

**Resetting a gem**

When an international conglomerate outgrew its long-time corporate home five years ago, they purchased a 49-acre Glenview campus with over 500,000 square feet for its 500+ employees.

Kevin Coe, Moore Landscapes Landscape Architect, explains, “The site had sat unused for 10 years with no maintenance other than mowing. The first step of the site restoration process was to update the landscape master plan to reflect the new owner’s desired uses, sustainability values, and their wish to provide an active campus environment for their employees.”

“With most of the plant material overgrown and site structures in disrepair,” Coe continues, “a considerable amount of site renovation and replacement work was necessary. The updated landscape master plan was the road map that helped the client determine phasing and the timeline for their site investment.”

The first phase of master plan projects was completed prior to employees relocating to the
site. Existing plant material was replaced with drought-tolerant perennials, grasses, flowering shrubs and evergreens that provide year-round interest while respecting sustainability values. Plantings are supplemented with annual flowers to provide the colorful landscape the owners desire. The existing decomposed-granite walking path was relocated in some places and the entire path was expanded to five-feet-wide so employees can walk comfortably side-by-side, a strategy to encourage both wellness and social interaction. The entire irrigation system was replaced and crumbling retaining walls were rebuilt.

“We’re tackling additional sections of the master plan each year. Budgets have been established for all proposed work. The owner will phase installations and enhancements to fit their annual operating and capital budgets;” Coe concludes.

**Envisioning solutions**

With the current conditions analysis completed, the master planning process turns from evaluation and assessments to design solutions and new features to incorporate into the master plan. “Nearly every property we work with is focused on switching to more sustainable plant material, adding features that support exercise and wellness, and increasing site functionality,” Little commented. “Lifestyles evolve; the ways we use outdoor spaces are different now than they were 10 years ago.”

Popular outdoor elements include green roofs, designated pet areas, children’s play areas, smoking areas, outdoor shared cooking or BBQ areas, tables and seating arrangements, and expanded parking for visitors and tenants. Properties that want to maintain their desirability and increase their value must plan and budget for continuous improvement.

**Fort Sheridan’s enduring master plan**

The Town of Fort Sheridan, a residential community on the North Shore of Lake Michigan, is a remarkable example of honoring a historic site master plan and using the plan to inform today’s operating decisions.

Fort Sheridan, originally developed as a U.S. Army installation in the late 1800s on 640 acres of prime Lake Michigan property, was partially decommissioned in the 1990s and redeveloped into a neighborhood with 550 residences. Residences include new and historic single-family homes, as well as townhomes, condos and duplexes.

Fort Sheridan Master Homeowners Association (MHA) Property Manager Mary Lynne Gaedele, CMCA of Lieberman Management Services notes, “Ossian C. Simonds served as the landscape architect during the initial base design and established a native plant palette and a landscape style that endures to this day. We guide homeowners through the approval process for any landscape additions or modifications to ensure harmony with the national historic neighborhood guidelines and the master plan covenants established when Fort Sheridan was redeveloped in the 1990s.”

Fort Sheridan MHA Board and Landscape Committee member Dave Henderson explains, “Every year or two, the Landscape Committee reassesses how the site looks and functions. As trees, shrubs and perennials mature, we consider what adjustments and improvements are needed. We’re not redesigning the master plan, but we’re making sure it’s living up to its potential.”

**Addressing labor-intensive planting beds**

The work on the main entrance is one of several current projects derived from the most recent master plan update. As Henderson and Gaedele described, the main entrance has a large planting bed with native grasses that has become very labor intensive due to its size and invasive species. This bed is being reworked and down-sized to be more manageable while retaining its color and seasonal interest.

**Upgrading entry signage**

Another in-progress project is upgrading the signage at the neighborhood’s secondary entrance to enhance visibility. This entrance is shared with the
still-active portion of the military base, so a more distinctive entryway is needed to distinguish the neighborhood entrance. Along with new monument signage, the surrounding planting beds will be changed from primarily annuals to perennials, evergreens, and boulder outcroppings to make the area more colorful year-round while using plants and a cohesive style consistent with the 1800s master plan concepts.

Managing historic trees

“Fort Sheridan’s MHA is entrusted with the oversight of the community’s designated historic trees, which are managed with a detailed tree inventory,” notes Gaedele. “This is an important part of the landscape master plan, as we determine treatment and replacement of our historic ash trees.”

Master plan helps determine budgets

With a master plan, the landscape construction team can establish budget ranges for each proposed element. During this phase of budgeting, sequencing of projects will also be considered to determine how costs are impacted by timing or by grouping certain scopes or projects together.

Another consideration is whether the scale or scope of the project is a capital investment or can be managed as an enhancement in the annual landscape maintenance budget.

Master plans essential for reserve studies

Nik Clark, partner with Superior Reserve Engineering & Consulting shared his insight about the value of having a landscape master plan as part of an HOA’s long term budgeting and planning process. “Master plans are integral to capital reserve studies,” Clark notes. “Reserve studies determine remaining useful life projections and replacement costs for existing assets. Landscape replacement can be a six-figure expense for some properties.”

Historically, Clark saw a lot of shortcomings in condo and HOA reserve studies that either didn’t include landscaping or only included an arbitrary amount based on a nominal per-unit allowance. He advises clients that a reserve study should determine the remaining useful life of the landscape and site assets that exist now, so that current unit owners are contributing an appropriate amount corresponding to the amount of the life of those assets they enjoyed.

Clark explained that a master plan may call for not just replacement but improvements to site and landscape. A reserve consultant will help guide an association through different reserve strategies, some of which require philosophical choices as well. Clark poses the question, “If a master plan calls for a significant future upgrade in landscaping to increase curb appeal, should existing unit owners be paying higher assessments for an improvement that won’t take place until they may no longer live in the association?”

It’s up to boards to make the ultimate decision what to reserve for. Some choose to reserve for replacement items (e.g. parking lot resurfacing) and do a special assessment at the time of the improvement for new items (e.g. additional parking spaces). Other boards choose to use reserve funds for both replacements and additions and then have the reserve study revisited to increase assessments appropriately.

Regardless of reserve philosophy, boards need to plan and budget for landscape renovations and maintenance. The only way to do so with a high degree of accuracy, is to work from a detailed landscape master plan that includes, as appropriate, design specifications, tree inventory and an overall management plan.

Planning timeframe

“For a comprehensive master plan update, facility managers of larger corporate or campus-style properties should allow a minimum of one year for assessments, design, community input, and the permit process required for structures, retaining walls and tree replacement,” recommends Landscape Designer Christen Little. Smaller scale projects follow the same planning process so it’s smart to allow for a similar timeframe.

Advantages of revisiting your landscape master plan

What benefits are gained by committing yourself to a year-long planning process? Plenty! Master plan principles guide investment decisions and help determine capital budgets, reserves, and operating budgets. The planning process aligns owners and board members so decision-making is streamlined. Operating costs are wisely allocated and your property will have a cohesive style with a consistent plant palette and enhanced curb appeal.

A landscape master plan update builds upon your property’s existing strengths and is the smart way to make sure owners get maximum return on their investment along with enhanced beauty and performance.