ARBTECH

BS5837:2012
Trees in relation to design, demolition and construction – Recommendations

Tree Survey

Kate Mason

Laneside House,

Wigglesworth,

Lancashire,

BD23 4SL

7 February 2023

Author: Russell Pearce BSc (Hons) Arboriculture

Introduction

Arbtech Consulting Limited (Arbtech) received written instruction in February 2023 from Kate Mason to attend Laneside House, Wigglesworth, Lancashire, BD23 4SL to undertake an arboricultural survey a to BS5837:2012 guidance to assess trees, hedges and major shrub groups growing on and within influencing distance of the site and to produce a Schedule of trees, Tree Constraints Plan, Arboricultural Impact Assessment, Arboricultural Method Statement and Tree Protection Plan.

I am Russell Pearce, an arboricultural surveyor for Arbtech Consulting Ltd. I undertook the tree survey on 7th February 2023 and subsequently, have produced this summary of my findings.

I graduated from UCLan in 2014 with a *BSc (Hons) Arboriculture* degree and have in 9 years' experience within the arboriculture industry. I have experience working in the public and private sectors, having previously worked for Kent County Council, Medway Unitary Council and reputable consultancy firms. I am LANTRA certified in Professional Tree Inspection and has various NPTC qualifications. I also have experience carrying out CAVAT valuation surveys, and TEMPO assessments in relation to the statutory protection of trees.

The advice below and appended is underwritten by our Professional Indemnity insurance for the business practice of Arboricultural Consultancy in the sum of one million Pounds Sterling in each and every claim.

Table 1: Documents referred to.

Document	Reference No.
Survey base drawing	Laneside_PP_Export_010223
LPA pre-app comments	N/A
British Standard 5837:2012	"BS5837"
Tree Survey Schedule	Arbtech TS 01
Tree Constraints Plan	Arbtech TCP 01

Tree Survey

Survey: An arboricultural survey to BS5837 of all trees within impacting distance of the site was undertaken by Russell Pearce on 7th February 2023.

During the survey, I categorised the trees using "Table 1 – Cascade chart for tree quality assessment" of the BS5837:2012 (see Appendix 1).

A total of 16 (sixteen) individual trees, 4 (four) groups of trees and 1 (one) hedge were surveyed. Details for each of the trees surveyed are provided in the Schedule of Trees (see Appendix 2).

Table 2: Documents upon which this tree survey has been based.

Document	Originator	Reference Number	Title
OS Tile	Ordnance Survey	Laneside_PP_Export_010223	Laneside House

Limitations: The survey was made at ground level using visual observation only. Detailed examinations, such as climbing inspections and decay detection equipment were not employed, though may form part of the survey's management recommendations. Measurements were taken using specialist tapes, laser and GPS devices. Where this was not possible, measurements are estimated.

Scope: Pre-development tree surveys make arboricultural management recommendations based exclusively upon the individual tree or group of trees condition relative to their present context (*i.e. not in relation to the proposed development*).

Legal Status: No statutory protection check has been performed. BS5837 does not draw any distinction between trees subject to statutory protection, such as a Tree Preservation Order ("TPO"), and those trees without. This is principally because a detailed planning consent overrides any TPO protection. Consequently, we do not seek to offer any comparison between or infer any difference in the quality or importance of TPO trees and other trees.

* For more information on the surveyed trees please see Arbtech Consulting Ltd, Tree Survey Schedule (Appendix 1), Tree Survey Report and Tree Constraints Plan.

Site description

Example - The rectangular rural site is located to south of Wigglesworth is flat with minor undulations, bounded by trees to the south and along the south east boundary adjacent to Forest Becks brow and a tarmacked access road running along the northwest boundary.

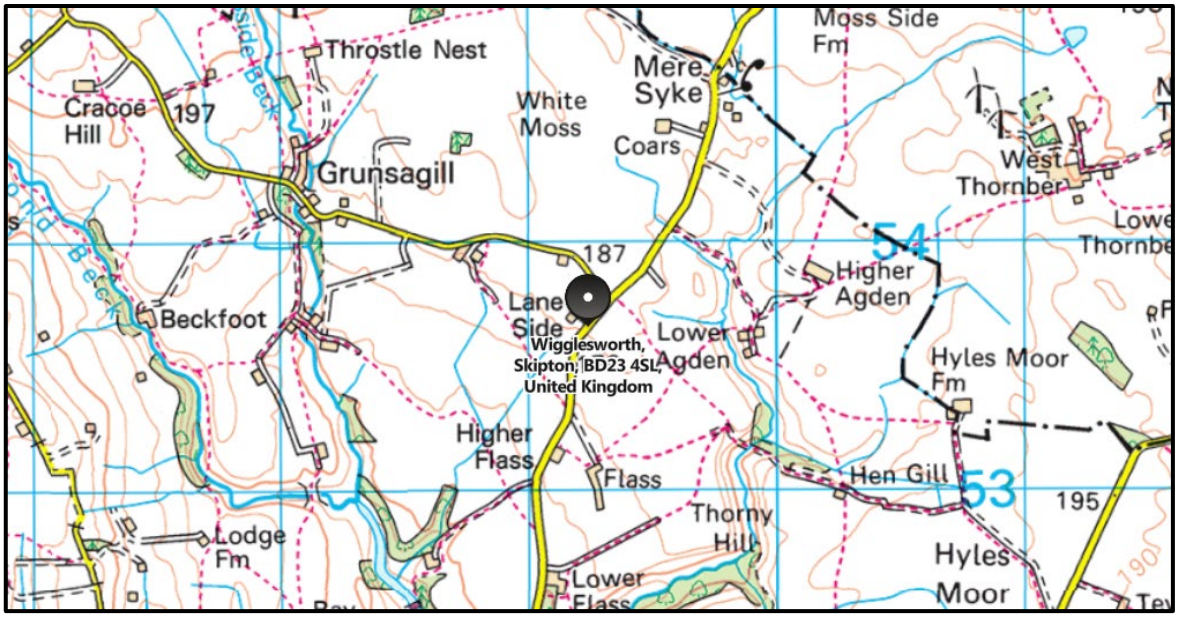


Figure 1: OS Map (Bing Maps) Showing Site Location

Figure 2: Aerial Image of Site (Google Earth) Illustrating Site Boundary

BS5837:2012 Scope

This standard recognises that there can be problems for development close to existing trees which are to be retained, and of planting trees close to existing structures. This standard sets out to assist those concerned with trees in relation to construction to form balanced judgements. It does not set out to put arguments for or against development, or for the removal or retention of trees. Where development, including demolition, is to occur, the standard provides guidance on how to decide which trees are appropriate for retention, on the means of protecting these trees during development, including demolition and construction work, and on the means of incorporating trees into the developed landscape.

Methodology

The methodology used to assess the trees was the British Standard 5837:2012 'Trees in Relation to Construction' tree survey method. The aim of the survey is to establish which trees are moderate and good quality; suitable for retention and justifying protection. And, which trees are low or poor quality; either undesirable or unsuitable to retain and protect.

The tree survey includes all trees included in the land survey red line boundary plan, as well as any that may have been missed, and it should categorize trees or groups of trees, including woodlands for their quality and value within the existing context, in a transparent, understandable and systematic way. Where the arboriculturist has deemed it appropriate, the trees have been tagged with small metal or plastic tags, placed as high as is convenient on the stem of each tree.

Whilst master plan proposals for the development of the site might be available, the trees have been surveyed without taking these into consideration. All detailed design work on site layout should take into consideration the results of the tree survey (and the TCP).

Trees forming groups and areas of woodland (including orchards, wood pasture and historic parkland) are identified and considered as groups where the arboriculturist has determined that this is appropriate, particularly where they contain a variety of species and age classes that could aid long-term management. It is often expedient to assess the quality and value of such groups of trees as a whole, rather than as individuals. However, an assessment of individuals within any group has been undertaken if they are open-grown or if there is a need to differentiate between them.

The quality and value of each tree or group of trees has been recorded by allocating it to one of the four categories: A, B, C, or U (highest to lowest quality respectively). The categories are differentiated on the tree survey plan by colour, or by suffixing the category adjacent to the tree identification number on the TCP.

The survey schedule lists all the trees or groups of trees. The following information is also provided:

- Sequential reference number (to be recorded on the tree survey plan);
- Species (common and/or taxonomic names);
- Height in meters (m);
- Trunk diameter in millimetres (mm) at 1.5 m above adjacent ground level or immediately above the root flare for multi-stemmed trees;
- Crown (branches) spread in meters taken at the four cardinal and/or intercardinal compass points;
- Height of crown clearance above adjacent ground level in meters (m);
- Age class
- Physiological condition
- Structural condition
- Comments/description of features
- Estimated remaining contribution
- Retention Category as described by application of the BS5837:2012 **Cascade Chart for Tree Quality Assessment (Appendix 1)**

Definitions

Arboriculturist

An arboriculturist (or arboricultural consultant) is a person who has, through relevant education, training and experience, gained recognized qualifications and expertise in the field of trees in relation to construction.

Tree Survey

A tree survey should be undertaken by an arboriculturist and should record information about the trees on a site independently of and prior to any specific design for development. As a subsequent task, and with reference to a design or potential design, the results of the survey should be included in the preparation of a tree constraints plan, which should be used to assist with site layout design.

Tree Constraints Plan

A TCP is a plan, typically delivered as an AutoCAD drawing (.dxf or .dwg file format), prepared by an arboriculturist for the purposes of layout design showing the root protection area and representing the effect that the mature height and spread of retained trees will have on layouts through shade, dominance, etc.

Root Protection Area

An RPA is a layout design tool indicating the area surrounding a tree that contains sufficient rooting volume to ensure the survival of the tree, shown in plan form in m².

Construction Exclusion Zone (also termed Tree Protection Zone)

A construction exclusion or tree protection zone is an area based on the RPA (in m²), identified by an arboriculturist, to be protected during development, including demolition and construction work, by the use of barriers and/or ground protection fit for purpose to ensure the successful long-term retention of a tree.

Arboricultural Impact Assessment

This is a study, undertaken by an arboriculturist, to identify, evaluate and possibly mitigate the extent of direct and indirect impacts on existing trees that may arise as a result of the implementation of any site layout proposal.

Tree Protection Plan

A TPP is a plan, typically delivered as an AutoCAD drawing (.dwg file format), prepared by an arboriculturist showing the finalized layout proposals, tree retention and tree and landscape protection measures detailed within the arboricultural method statement, which can be shown graphically.

Arboricultural Method Statement

This is a methodology for the implementation of any aspect of development that has the potential to result in loss of or damage to a tree. The AMS is likely to include details of an on-site tree protection monitoring regime.

Limitations

Trees were inspected from using visual observation from ground level only. Trees were not climbed or inspected below ground level. Inaccessible trees will have best estimates made about the location, physical dimensions and characteristics. Trees have been grouped where BS5837 guides us that it is expedient to do so. Trees have been excluded from the survey if they are found by us to be sufficiently far away from the proposed developable area or if they are outside of the red line boundary plan showing the expectations of our Client for the extent of the survey. BS5837 does not draw any distinction between trees subject to statutory protection, such as a Tree Preservation Order ("TPO"), and those trees without. This is principally because a detailed planning consent overrides any TPO protection. Consequently, we do not seek to offer any comparison between or infer any difference in the quality or importance of TPO trees and other trees.

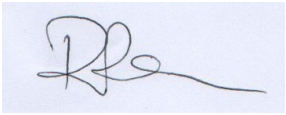
Appendices

The following documents were released to the Client as appendices to this report:

- Survey Schedule (.pdf)
- Tree Constraints Plan drawing (.dwg/.dxf & .pdf)

If you require clarification of information contained herein, please do not hesitate to contact us via 01244 660558.

Yours Sincerely,



Russell Pearce, BSc

Surveyor

Appendix 1: Cascade Chart for Tree Quality Assessment

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Cascade Chart for Tree Quality Assessment (BS5837:2012)

Category and definition	Criteria (including subcategories when appropriate			Identification on plan
Trees unsuitable for retention (see Note)				
Category U Those in such a condition that they cannot realistically be retained as living trees in the context of the current land use for longer than 10 years	• Trees that have serious, irremediable, structural defect, such that their early loss is expected due to collapse, including those that will become unviable after removal of other category U trees (e.g. where, for whatever reason, the loss of companion shelter cannot be mitigated by pruning) • Trees that are dead or are showing signs of significant, immediate, and irreversible overall decline • Trees infected with pathogens of significance to the health and/or safety of other trees nearby, or very low quality trees suppressing adjacent trees of better quality *NOTE Category U trees can have existing or potential conservation value which might be desirable to preserve; see 4.5.7.*			Dark red
	1 Mainly arboricultural qualities	**2 Mainly landscape qualities**	**3 Mainly cultural values, including conservation**	
Trees to be considered for retention				
Category A **Trees of high quality** with an estimated remaining life expectancy of at least 40 years	Trees that are particularly good examples of their species, especially if rare or unusual; or those that are essential components of groups or formal or semi-formal arboricultural features (e.g. the dominant and/or principal trees within an avenue)	Trees, groups or woodlands of particular visual importance as arboricultural and/or landscape features	Trees, groups or woodlands of significant conservation, historical, commemorative or other value (e.g. veteran trees or wood-pasture)	Light green
Category B **Trees of moderate quality** with an estimated remaining life expectancy of at least 20 years	Trees that might be included in category A, but are downgraded because of impaired condition (e.g. presence of significant though remedial defects, including unsympathetic management and storm damage), such that they are unlikely to be suitable for retention of beyond 40 years; or trees lacking the special quality necessary to merit the category A designation	Trees present in numbers, usually growing as groups or woodlands, such that they attract a higher collective rating than they might as individuals; or trees occurring as collectives but situated so as to make little visual contribution to the wider locality	Trees with material conservation or other cultural value	Mid blue
Category C **Trees of low quality** with an estimated remaining expectancy of at least 10 years, or young trees with a stem diameter below 150mm	Unremarkable trees of very limited merit or such impaired condition that they do not qualify in higher categories	Trees present in groups or woodlands, but without this conferring on them significantly greater collective landscape value; and/or trees offering low or only temporary/transient landscape value	Trees with no material conservation or other cultural value	Grey

Appendix 2: Schedule of Trees

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Tree Survey Schedule
Laneside House, Wigglesworth, Lancashire, BD23 4SL

Client	Kate Mason
Survey Date	07/02/2023
Weather Conditions	Clear
Surveyor	Russell Pearce

Key:

Tree No.	A unique number or reference to identify trees or groups as shown on associated plans.
Species	Common and/or taxonomic name.
Ht.	The height of the tree in meters (m).
Trunk Diameter	The stem diameter in millimetres (mm) taken at 1.5m above ground level unless otherwise specified.
Crown Spread	The extents of the crown taken, in meters (m), at cardinal points of the compass: North (N); East (E); South (S) and West (W); or intercardinal points: Northeast (NE); Southeast (SE); Southwest (SW); Northwest (NW)
Crown Clear.t	The height of the crown above the current ground level, in meters (m), taken at cardinal points of the compass: North (N); East (E); South (S) and West (W); or intercardinal points: Northeast (NE); Southeast (SE); Southwest (SW); Northwest (NW)
Age Class	Age classification: Young (Y); Semi-mature (SM); Early Mature (EM); Mature (M); Over Mature (OM).
Phys. Cond.	The general physiological condition of the tree: Good; Fair; Poor; Decline; Dead.
Struct. Cond.	The general structural condition of the tree: Good, Fair, Poor, Hazardous.
Comments	Notes and general comments on the structural condition of the tree, its environment and it estimated remaining contribution.
Est. Rem. Cont.	Estimated remaining contribution (years): <10; 10+; 20+ 40+
Cat.	Retention Category as described in the **Cascade Chart for Tree Quality Assessment at Appendix 1:** A, B, C, U (subcategories 1, 2, 3)

Tree No.	Species	Ht. (m)	Trunk Diam. (mm)	Crown Spread (m)				Crown Clear. (m)				Age Class	Phys. Cond.	Struct. Cond	Comments	Est. Rem. Cont. (years)	Cat.
				N	E	S	W	N	E	S	W						
T1	Silver Birch	8	150	3	1	2	3	2	3	2	2	SM	Good	Fair	Slightly supposed by adjacent trees - minor crown asymmetry. Slender stem. Waterlogged RPA.	10+	C1
T2	Silver Birch	11	230	2	2	1.5	2.5	1	1	1	1	SM	Good	Good	Bifurcation at 5.5m. Waterlogged RPA.	20+	B1
T3	Silver Birch	14	270	3	2	2	4	0	0	0	2	SM	Good	Good	No defects noted. Waterlogged RPA.	20+	B1
T4	Silver Birch	9	140	2	1	1	2	2	2	2	2	SM	Good	Fair	Minor lean to NE with basal sweep. Waterlogged RPA.	10+	C1
T5	Silver Birch	10	210	2.5	2	2.5	2.5	2.25	2.25	2.25	2.25	SM	Good	Good	Codominant bifurcation at 3.25m. Waterlogged RPA.	20+	B1

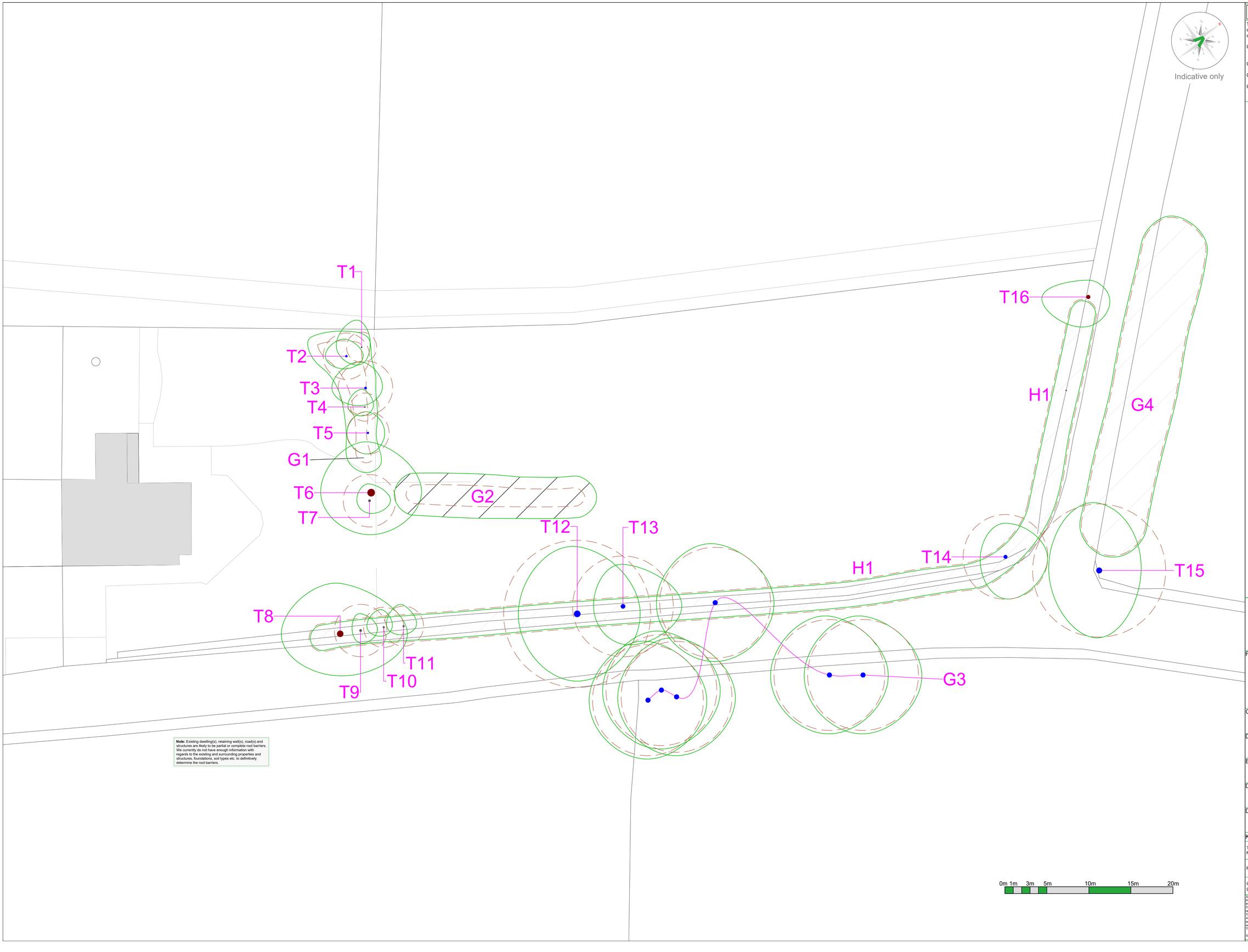
Tree No.	Species	Ht. (m)	Trunk Diam. (mm)	Crown Spread (m)				Crown Clear. (m)				Age Class	Phys. Cond.	Struct. Cond	Comments	Est. Rem. Cont. (years)	Cat.
				N	E	S	W	N	E	S	W						
T6	Ash	16	850	6	6	5	6	5	6	4	2	OM	Decline	Hazardous	ADB present with 40% crown dieback - rechis retained. Small cavity opening on N side - torch shows significant cavity. Percussion test indicates significant decay below 2.5m. Dense ivy throughout.	<10	U
T7	Lawson's Cypress	5	260	2	2.5	1.5	1.5	0	0	0	0	SM	Fair	Fair	Heavily suppressed by adjacent tree. Reduced aesthetic value. Minor crown asymmetry. Previously topped at 1.25m. Trifurcated with acute unions at 1m. DBH taken below 1m.	10+	C1
T8	Ash	17	720	6	8	5	7	4	5	5	6	OM	Decline	Fair	ADB present >60% crown dieback. Large deadwood throughout crown. Advanced state of decline. Codominant bifurcation at 4.5m.	<10	U

Tree No.	Species	Ht. (m)	Trunk Diam. (mm)	Crown Spread (m)				Crown Clear. (m)				Age Class	Phys. Cond.	Struct. Cond	Comments	Est. Rem. Cont. (years)	Cat.
				N	E	S	W	N	E	S	W						
T9	Fir	13	260	2	2	1.5	1	1	1	1	1	SM	Fair	Fair	Suppressed by adjacent tree. Slender phototrophic form. Much of lower crown shaded out - increased windsail lever arm.	10+	C1
T10	Lawson's Cypress	4	140 110 90	2	1	1	2	1	1	1	1	SM	Good	Fair	Topped at current height below UKPN lines. Low aesthetic value.	10+	C1
T11	Lawson's Cypress	4	130 120 90	2.5	1.5	1	2	1	1	1	1	SM	Good	Fair	Topped at current height below UKPN lines. Low aesthetic value.	10+	C1
T12	Lime	16	730	8	7.5	8	7	3	3	4	4	M	Good	Good	Open balanced spreading crown. Codominant bifurcation at 2.5m. Some tip dieback. Minor deadwood within crown. Limited access to stem - dense vegetation - DBH estimated.	20+	B1

Tree No.	Species	Ht. (m)	Trunk Diam. (mm)	Crown Spread (m)				Crown Clear. (m)				Age Class	Phys. Cond.	Struct. Cond	Comments	Est. Rem. Cont. (years)	Cat.
				N	E	S	W	N	E	S	W						
T13	English Oak	13	500	5	7	4.5	3.5	3	3	2	3	EM	Fair	Good	Deadwood throughout crown. Slightly suppressed crown with minor asymmetry. Some localised dieback.	20+	B1
T14	Sycamore	8	420	4	5	5	3	4	4	3	2	SM	Fair	Fair	Squat form with imbalanced crown - weight bias to East. Dense ivy clad stem and primary branch framework. Exposed thigmomorphogenic form.	20+	B1
T15	Sycamore	14	660	8	5	8	6	3	3	4	4	M	Good	Good	Open balanced crown. Minor partially occluded impact wounds.	20+	B1
T16	Ash	9	440	2	2.5	3.5	5.5	4	4	3	3	SM	Decline	Fair	ADB present >75% crown dieback. In advanced state of decline.	<10	U
G1	Birch, Hornbeam and Rowan	5 to 7	100	2.5	2.5	2.5	2.5	1	1	1	1	Y	Fair	Fair	Young understory group suppressed by adjacent larger trees. Reduced aesthetic value. Waterlogged RPA.	10+	C2

Tree No.	Species	Ht. (m)	Trunk Diam. (mm)	Crown Spread (m)				Crown Clear. (m)				Age Class	Phys. Cond.	Struct. Cond	Comments	Est. Rem. Cont. (years)	Cat.
				N	E	S	W	N	E	S	W						
G2	Holly, Hazel & Wild Rose	2 to 4	80	2.5	2.5	2.5	2.5	0	0	0	0	Y	Fair	Fair	Dense scrubby low value group.	10+	C2
G3	Ash, Lime, Alder	14 to 16	550	7	7	7	7	3 to 4	3 to 4	3 to 4	3 to 4	EM	Good to Fair	Good to Fair	Ash trees with ADB (3rd party). Open balanced crowns. Dense ivy clad stems.	20+	B2
G4	Alder, Sycamore, Ash	6 to 9	300	4	4	4	4	3	3	3	3	SM	Good to Poor	Good to Fair	3rd party linear boundary group. Low crowns over access road. Flailed back from roadside. Group of low aesthetic value.	10+	C2
H1	Holly, Beech, Hazel, Ash,	2 to 5	125	1.5	1.5	1.5	1.5	0	0	0	0	EM	Fair	Fair	Lapsed hedgerow previously maintained at 1m. Flailed back on road side.	10+	C2

Appendix 3: Tree Constraints Plan



Note: Existing dwelling(s), retaining wall(s), road(s) and structures are likely to be partial or complete root barriers. We currently do not have enough information with regards to the existing and surrounding properties and structures, foundations, soil types etc. to definitively determine the root barriers.

Tree Categories

Trees are categorised in accordance with the cascade chart in Table 1 of the British Standard BS 5837:2012 'Trees in relation to design, demolition and construction - Recommendations'

Category 'U' - Trees in such condition that they cannot realistically be retained as living trees in context of the current land use for longer than 10 years.
Category 'A' - Trees of high quality with an estimated remaining life expectancy of at least 40 years.
Category 'B' - Trees of moderate quality with an estimated remaining life expectancy of at least 20 years.
Category 'C' - Trees of low quality with an estimated remaining life expectancy of at least 10 years, or young trees with a stem diameter below 150mm.

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Unit 3, Well House Barns, Chester, CH4 0DH
https://arbtech.co.uk, 01244 661170

Project:
Lanesworth House,
Wigglesworth,
Lancashire,
BD23 4SL

Client:
Kate Mason

Drawing:
Tree Constraints Plan

Based on:
Laneside_PP_Export_010223

Drawing No:		Rev:
Arbtech TCP 01		
Date: Feb 2023	Scale: 1:200 @ A1	Drawn: RP

Key:

Tree Nos.:	T1	Tree Canopies:		Trunks:	
RPAs:		Category 'U' trees:		Category 'B' trees:	
Category 'B' groups:		Category 'C' trees:		Category 'C' groups:	

All dimensions should be checked on site. No dimensions are to be scaled from this drawing.
Please notify us of any discrepancies found. Arbtech Consulting Ltd. cannot be held responsible for inaccuracies in the base drawing in which this plan is based.
This drawing is designed to reflect the principles of the layout or design only, and relates only to the protection of retained trees.
This drawing is not to be read as a definitive part of the engineering or construction designs or method statement. An architect or structural engineer should be contacted over any matters of construction, detailing or specification and for any standards or regulatory requirements relating to proposed structures, hard surfacing or underground services.
This drawing was produced in colour - a monochrome copy should not be relied upon.

Document Production Record

Document number	Editor	Signature	Position	Issue number	Date
Arbtech TSR 01	Russell Pearce		Surveyor	1	07/02/2023

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