



Arboricultural Impact Assessment BS5837:2012

Holden House, 1 Canal Bank

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Arboricultural Impact Assessment BS5837:2012

Holden House, 1 Canal Bank

Ref: AEL-AIA-18097

Reuben Hayes - Apex Environmental

Contact details

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	Contact	
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1. Summary

1.1 Outline of proposal

Development of existing outbuilding to create a new restaurant area with associated services.

1.2 Age Class of trees

Young	Semi Mature	Middle Aged	Early Mature	Mature	Over Mature	TOTAL
			1	6		7

1.3 Category of trees

A			B			C			U
1	2	3	1	2	3	1	2	3	
			2			4			1

1.4 Works required

Tree Ref:	Category	Works required	Development	Arboricultural
T.1	B1	Fell and stump removal	Yes	
T.2	B1	Fell and stump removal	Yes	
T.3	C1	Fell and stump removal	Yes	
T.4	U	Fell and stump removal		Yes
T.5	C1	Fell and stump removal	Yes	
T.6	C1	Fell and stump removal	Yes	
T.7	C1	Fell and stump removal	Yes	

2. Instructions

- 2.1 This report has been prepared to discharge the instruction of the client, Ms Zadarko 'The Client' in respect of detailed planning permission at Holden House, 1 Canal Bank, Shardlow, Derby, DE72 2GL
- 2.2 The Client, has commissioned a Tree Survey in compliance with BS5837: 2012 to prepare a Tree Survey, Arboricultural Constraints Assessment, Arboricultural Impact Assessment, Tree Protection Plan and heads and terms of a Method Statement for the trees at the site
- 2.3 The site survey was carried out on the 10th February 2019. The relevant qualitative and quantitative tree data and information was recorded to assess the condition of the trees, their constraints upon the proposed development and a summary on any proposed protection and construction specification required.
- 2.4 **Qualifications and experience:** I have based this report on my site observations and the provided information, and I have come to conclusions in the light of my experience. I have experience and qualifications in arboriculture, and include a summary in Appendix IV

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2.5 All information given is in accordance with British Standards 5837:2012 – Trees in relation to design, demolition and construction – Recommendations.

- I. Identification of tree by number value (collates with the associated plans)
- II. Common tree species
- III. Height (m)
- IV. Stem diameter (mm) at 1.5m above ground using a DBH tape (or as per BS5837 fig C.1)
- V. Branch spread to the four cardinal points (m)
- VI. Existing height above ground of first branch and direction (m)
- VII. Existing height above ground of canopy (m)
- VIII. Life Stage (Young, Semi Mature, Early Mature, Mature, Over Mature)
- IX. Estimated Remaining contribution (yrs) <10, 10+, 20+, 40+
- X. General observations; Condition and Preliminary management recommendations; Physical condition and structural defects
- XI. Category as per BS5837 Table 1
- XII. Root Protection Area (RPA) radius (m)
- XIII. Root Protection Area (RPA) m²

3. Caveat

This advice and all appendices are subject to caveat as follows:

- 3.1. This report is nullified if any remedial works are undertaken on any area of the site, on or after the date of study/survey.
- 3.2. The report is only valid on the date on inspection and any deletion, editing or alteration will void it in its entirety.
- 3.3. The responsibility for any works undertaken on the basis of the recommendations of this report does not form part of this contract. No responsibility is assumed by the Author of this report or by Reuben Hayes for any legal matters that may arise as a consequence.
- 3.4. The Author of the report, will be required to attend court or give testimony as part of this contract. The report is not valid in adverse or unpredictable weather conditions or for any failure due to *Force Majeure*.
- 3.5. No liability is assumed by the Author of the report for any misuse, misinterpretation or misrepresentation of information contained herein.
- 3.6. This report has been compiled using only the information made available to the Author as at the above date of inspection.
- 3.7. The assessment, unless described as "detailed" was of a preliminary nature, conducted from ground only; the tree was not climbed or inspected below ground level (inc. roots). There was no use of decay detection equipment, and only basic surveying instruments were used.
- 3.8. The Author did not have at the time of writing any information as to the integrity of the main structure, its annexes or the drainage system.
- 3.9. Water supply/drainage systems, if damaged, can allow roots to penetrate, however, if the system is sound, or after repair, roots have little capacity to access/damage underground services.
- 3.10. Any doubt as to the structural condition of properties would require the advice of a structural engineer.
- 3.11. Apex Environmental Ltd are not responsible for any works other than those invoiced for.
- 3.12. The observations are visual in nature and are made from ground level only, no climbing inspections have been carried out nor was there the use of binoculars.

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4. Scope of Report

- 4.1 The aim of the report is to give guidance under the British Standards BS5837:2012 Trees in relation to design, demolition and construction. This will help to produce a harmonious and sustainable situation and long term development.
- 4.2 The report will identify the value and quality of the woody vegetation on and within impacting distance from the site. All data gathered will be used to identify and address the impacts that vegetation will have on the proposed development and the impact the development will have on the vegetation.

5. Documents Supplied

Document title	Document Ref	Format	By whom	Date given
013 2019	001	pdf	Architect	14/08
013 2019	002	pdf	Architect	14/08
013 2019	003	pdf	Architect	14/08
013 2019	004	pdf	Architect	14/08
013 2019	005	pdf	Architect	14/08
013 2019	006	pdf	Architect	14/08
013 2019	001	DWG	Architect	14/08
Topographical Survey	155757	DWG	Architect	14/08

6. Legal and Policy Information

6.1. Tree Protection Orders:

The land is not protected by a Tree Preservation Order. It is advisable before carrying out any works to trees to check on any updated status.

6.2. Wildlife protection:

It is a criminal offence under normal circumstances to disturb or destroy – whether intentional or unintentional - the nesting sites of wild birds or the roost sites of bats, under the 'Wildlife & Countryside Act 1981 and the 'Countryside and Rights of Way Act 2000'. Therefore, avoid carrying out significant tree works during the bird nesting season [mid- March to end of July] and ensure that trees are professionally surveyed for signs of bat roosts and/or bat activity before starting any tree work. Further advice on protected species can be obtained from the local office of 'Natural England'.

6.3. Felling Licence:

Tree felling can also be restricted under the Forestry Act 1967. Under this act, there is an exemption from the need for a felling licence for "Felling necessary for the prevention of danger or the prevention or abatement of a nuisance".

If full planning consent is granted for the current proposal, then any trees which require felling to implement the approved plans are exempt from this statutory protection. It should also be considered that any proposed tree works detailed in the tree schedule are also implemented as part of the planning decision consent.

6.4. Conservation Area Protection:

The land is not within a Conservation Area. It is advisable before carrying out any works to trees to check on any updated status.

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7. Site Assessment

7.1 The Site is a former space possibly used as a habitable living space. This is now redundant and unused. The land sides on to the river bank and there is a sheer drop down between the two levels. To the rear of the building is an open area currently used as a chicken coup.

7.2 Soil Assessment

The assessment should determine whether the soil is shrinkable. If it is, trees and other vegetation have the potential to cause indirect damage to structures. In such cases, further assessments should be carried out and the design of foundations should be considered by a structural engineer.

No information has been supplied on the soil assessment. Details of which will need to be obtained and passed to the Arboricultural Consultant and Structural Engineer before the submission of any Arboricultural Method Statement.

7.3 There is a total of 6 trees. This report has only listed the trees in connection to the main development on the site. There are other trees on the site which are not affected by the development and these have been excluded.

8. Tree and vegetation findings

8.1 The tree survey has been carried out in accordance with BS5837:2012 section 4.4.

8.2 Tree categorisation method

The purpose of the method is to identify the quality and value of the existing tree stock, allowing informed decisions to be made concerning which trees should be removed or retrained in the event of development occurring.

A full tree survey has been included in appendix I.

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.

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

Category B – Trees of moderate quality with an estimated remaining life expectancy of at least 20 years

Category A – Trees of high quality with an estimated remaining life expectancy of at least 40 years

8.3 Any works with regards to the overall application have been listed in this report.

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8.4 Findings:

Young	Semi Mature	Middle Aged	Early Mature	Mature	Over Mature	TOTAL
			1	6		7

A			B			C			U
1	2	3	1	2	3	1	2	3	
			2			4			1

Significant trees on site:

Most of the trees on the site are self-set trees and are growing on unmade ground and the riverbank. There are two trees of higher visual significance and these are T.1 and T.2. However, they are close to the building and it is likely they are causing some direct damage to the building.

Trees to be removed for arboricultural concerns:

There is one tree that has failed and is growing at an acute angle. This has been listed as a Category U and should be removed on Arboricultural grounds.

9. Constraints posed by existing trees

The RPA and category of the trees retained on site are listed within the Tree Constraints Plan. This information is taken from above ground site observations. Inspection chambers or other features that may hinder to direct root growth have been indicated within the plan and the indicated RPA amended as per Section 5.2.1

Further constraints imposed by trees include:

Current and ultimate height and spread of tree(s)

Species characteristic, including canopy type, density of foliage and species susceptibility to external factors such as honey dew, branch drop, fruit fall

Shading on property and gardens, or excessive light to rooms (as indicated within the Tree Shadow Plan)

The presence of tree Preservation Orders and the Presence of Conservation Areas or other regulatory protection

Potential incompatibilities between the layout and trees

Working and access space needed for the construction of the proposed development. This might involve assess facilitation pruning, or the use of a height restriction to prohibit tall vehicles accessing a site containing trees with low canopies.

The effect that construction requirements might have on the amenity value of trees, both on and near the site, including the effects of pruning to facilitate access and working space.

The requirement to protect the overhanging canopies of trees where they could be damaged by machinery, vehicles, barriers or scaffolding, where it will be necessary to increase the extent of the tree protection barriers to contain the canopy.

Infrastructure requirements in relation to trees, e.g. easements for underground or above-ground apparatus; highway safety and visibility splays; and other infrastructural

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provisions, such as substations, refuse stores, lighting, signage, solar collectors, satellite dishes and CCTV sightlines.

The proposed end use of the space adjacent to retained trees

The potential for new planting to provide mitigation for any losses



10. Arboricultural Impact Assessment

10.1. Amenity value of the trees at the site

The main two trees on the grounds are T.1 and T.2, these are both Yew trees and growing to the front of the building. The canopies are touching the building and it also looks like they are causing direct damage to the building.

The other trees can also be seen when travelling along the road.

10.2. Facilitation pruning works

No facilitation pruning will be required to gain access to the site.

10.3. Storage of materials, siting of welfare units and contractor parking

The storage of materials, welfare and parking will all be housed on the existing hardstanding parking area.

10.4. Incursions between layout (foundations) and the trees for retention

The default position should be that structures are located outside of the RPAs of trees to be retained. However, where there is an overriding justification for construction within the RPA, technical solutions might be available that prevent damage to the tree(s), as per Section 5.3.1.

It should be demonstrated that the tree(s) can remain viable and that the area lost to encroachment can be compensated for elsewhere, contiguous with its RPA. And that a series of mitigation measures to improve the soil environment that is used by the tree for growth.

On this basis and from previous BS5837 standards it is sometimes acceptable to allow for encroachment of up to 10%. It should be possible to have viable grow areas on the other sides of the RPA which exceed 20%, thus compensating for the loss of viable rooting area. It would also be possible to carry out

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decomposition to the soils and add minerals and nutrients to aid root development in the viable areas.

Tree reference number	Species	Category grading	RPA	RPA m ²	Impact from building (m ²)	TOTAL %	Comments
T.7	Fraxinus excelsior	C1	3.9	48	48	100	Significant will require removal of tree
T.6	Fraxinus excelsior	C1	5.4	92	92	100	Significant will require removal of tree
T.5	Salix × sepulcralis	C1	7.8	191	191	100	Significant will require removal of tree
T.3	Salix × sepulcralis	C1	7.8	191	191	100	Significant will require removal of tree

10.5. Potential tree removal to facilitate the development

Apart from the removal of the trees listed above, it will also be a requirement to remove T.1 and T.2. These are to the front of the building and it will not be possible to reconstruct the building with the trees in situ. There is also an issue over the trees being close to the building and causing direct and indirect damage. The canopy is touching the building and has caused damage to the roof area. The walls are damaged by the trees and the age of the building is such that the foundations are likely to be minimal. The building is within the zone of influence of the trees and are likely to be causing damage to the building.

10.6. Inclusion of new infrastructure requirements

There will be limited infrastructure servicing the property. New services will be required, and they can be included in any approval condition. It should be possible to route all services through the car park area and away from any future tree planting.

10.7. Mitigation of tree loss and new planting

The development does remove several trees, however there will be some available space and it should be possible to locate new tree planting in the area to mitigate against any tree removal.

10.8. Canopy issues on the new development

Shading of buildings by trees can be a problem, particularly where there are rooms which require natural light such as living rooms, conservatories and kitchens with dining areas. The proposal should take in to account the existing trees and their ultimate size and canopy density. Open spaces such as gardens and sitting areas should be designed to meet the normal requirement for direct sunlight for at least a part of the day.

10.9. Tree works

Tree Ref:	Category	Works required	Development	Arboricultural
T.1	B1	Fell and stump removal	Yes	
T.2	B1	Fell and stump removal	Yes	
T.3	C1	Fell and stump removal	Yes	
T.4	U	Fell and stump removal		Yes
T.5	C1	Fell and stump removal	Yes	
T.6	C1	Fell and stump removal	Yes	
T.7	C1	Fell and stump removal	Yes	

10.10. Potential for future direct damage

If the development is approved in its current form, then there will be no future direct damage issues.

10.11. Future seasonal nuisances

If the development is approved in its current form, then there will be no future seasonal issues.

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11. Concluding Statement

- 11.1 The AMS will require details on any landscape proposal. (Reason): if accepted by the Local authority the AMS will bind the developer to the thinking of the Standard ensuring the retention of the good quality trees.

This concludes the report, if I can be of further assistance please do not hesitate to contact.

Signature: 

Date: 19th August 2019

Managing Director for and on behalf of Apex Environmental Limited

Reuben Hayes M.Arbor.A; CMgr MCMI
Apex Environmental Ltd



12. Heads and Terms of Arboricultural Method Statement

12.1. Tree Protection Plan

The tree protection plans has been produced in accordance with the BS5837:2012 standard 5.5. The plan has indicated the location of protection barriers to be erected to form the construction exclusion zone around the retained trees. It also shows the extent and type of ground protection, where necessary. All measurements for the protective fencing have been indicated, and any temporary access within the construction exclusion zone has been indicated. Other factors included are site construction access, contractors car parking, storage areas.

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13. Arboricultural terms

- 13.1 An “arboriculturist” 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.
- 13.2 A “Competent person” is someone who has had training and experience relevant to the matter being addressed and an understanding of the requirements of the particular task being approached. A competent person is expected to be able to advise on the best means by which the recommendations of the BS 5837: 2012 may be implemented.
- 13.3 A “tree survey” in the context of planning and development is taken to mean an assessment of the tree stock on site (or within area shown where appropriate), as individuals or groups. **(This is undertaken independent of and prior to any knowledge of a scheme being produced.)** Management recommendations in the tree survey schedule reflect the structural and physiological condition of the trees only. It is essential that the trees are assessed objectively and without reference to site layout proposals.
- 13.4 The “Construction” is a site-based operation with the potential to affect existing trees.
- 13.5 A “root protection area”, or RPA, is a layout design tool indicating the minimum area around a tree deemed to contain sufficient roots and rooting volume to maintain the tree’s viability, and where the protection of the roots and soil structure is treated as a priority. The RPA area is worked out on a mathematical basis and listed in appendix III
- 13.6 “Construction Exclusion Zone” (CEZ) is based upon the RPA above and forms the exclusion zone to which access is prohibited during the project phase.
- 13.7 A “tree constraints plan”, or TCP, is a scaled plan prepared by an arboriculturist showing the RPA and the accurate canopy spread of a tree, along with information to identify the tree by reference to a survey schedule, this will



identify any under and above ground constraints. Author to produce this in AutoCAD.

- 13.8 An "arboricultural impact assessment", or AIA, is a study or report undertaken by the project arboriculturist to include detailed information to evaluate the direct and indirect effects of the proposed design against the tree(s). As well as the potential future maintenance of the tree(s) against the proposed development, and where necessary recommends mitigation. The assessment should take account of the effects of any tree loss required to implement the design, and any potentially damaging activities proposed in the vicinity of retained trees.
- 13.9 An "arboricultural method statement", or AMS, 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. NOTE The AMS is likely to include details of an on-site tree protection monitoring regime
- 13.10 A "tree protection plan", or TPP, is a scale plan and should be superimposed on a layout plan, based on the topographical survey, showing all hard surfacing and other existing structures within the RPA. The plan should clearly indicate the precise location of protective barriers to be erected to form a construction exclusion zone around the retained trees.
- 13.11 Other plans and documents may be referred to and annexed where appropriate.
- 13.12 Access facilitation pruning is a one-off tree pruning operation, the nature and effects of which are without significant adverse impact on the tree(s) physiology or amenity value, which is directly necessary to provide access for operation on site.
- 13.13 Services are any above- or below- ground structure or apparatus required for utility provision. Examples include drainage, gas supplies, ground source heat pumps, CCTV and satellite communications.

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- 13.14 Stem is the principal above-ground structural component(s) of a tree that supports its branches.
- 13.15 Structures are manufactured objects, such as a building, carriageway, path, wall, service run and built or excavated earthworks.
- 13.16 A 'Veteran tree' is recognized by a set criteria as set by British Standards 2998; 2010, Tree Work – Recommendations. This must show signs of biological, cultural or aesthetic value that are characteristic of, but not limited to, individuals surviving beyond the typical age range for the species concerned.



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Appendix I – Tree Survey

List of trees on site:

Species (Common Name)	Species (Botanical Name)
Ash	<i>Fraxinus excelsior</i>
Willow	<i>Salix × sepulcralis</i>
Yew	<i>Taxus buccata</i>

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TREE SURVEY TO THE BRITISH STANDARD 5837:2012 "TREES IN RELATION TO CONSTRUCTION - RECOMMENDATIONS" **FIELD KEY:**

- TREE No. Tree identification method in sequential order – TXXX=Existing trees, GX=Group of trees, HX=Hedgerow
- SPECIES Species
- HEIGHT in (m) Approximate height of tree in metres;
- DBH in (mm) Stem diameter in millimetres taken at 1.5 metres above ground level; AV=average diameter (see appendix III)
- Branch Spread in (m) N - E - S - W Branch spread in metres reflecting the spread at the four principal compass points; N/A= Not Applicable in woodland settings
- Existing height above ground in (m) Height in metres of crown clearance above existing ground level: To include first significant branch and direction of growth (e.g. 2.5 – N)
- Life Stage Height of lower form of Canopy to inform current ground clearance, crown/stem ratio and shading
- Est. remain years Age classification (Y=young, SM=semi-mature, EM=early-mature, M=mature, LM=late-mature, OM=over-mature)
- General Observations Approximate years remaining (+40=minimum of 40 years, +20=minimum of 20 years, +10=minimum of 10 years, <10 less than 10 years)
- Preliminary management recommendations Condition of tree (good, fair, poor, dead); Structural and/or physiological condition, and/or preliminary management recommendations.
- Physical Condition and Structural Condition Works needed in order to retain tree in current setting or where works would be needed in order to facilitate development.
- RPA in (m²) Physiological condition (good, fair, poor, dead); to include and Structural defects such as the presence of any decay, fungal issues, pathogens, defects)

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Tree reference number	Species	Height (m)	Stem diameter (mm)	Canopy Spread N (m)	Canopy Spread E (m)	Canopy Spread S (m)	Canopy Spread W (m)	Height of crown clearance (m)	Age class	Physiological condition	Structural condition	Preliminary management recommendations	Estimated remaining contribution	Category grading	Number of Stems	RPA	RPA m ²
T.7	Fraxinus excelsior	10	320	4	2	1	2	3	Early Mature	Fair	Fair	feeding station at base	20-40	C1	1	3.9	48
T.6	Fraxinus excelsior	10	450	4	4	4	4	2	Mature	Fair	Fair	ivy on stem, reduced canopy live growth, will require removal of ivy	<10	C1	3	5.4	92
T.5	Salix x sepulcralis	12	650	4	4	4	4	2	Mature	Fair	Fair	ivy on stem, reduced canopy live growth, will require removal of ivy	10+	C1	5	7.8	191
T.4	Salix x sepulcralis	3	450	2	2	2	2	2	Mature	Poor	Poor	failed tree, main stem cracked	<10	U	1	5.4	92

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T.3	Salix x sepulcralis	12	650	4.4	4	2	4.6	2	Mat ure	Fair	Good	riverside weeping willow, main stem split in past, ivy on stem, branch hanging on roof. evidence of multipule branch failures in canopy, will require heavy reduction, large crack in building close to tree	40+	C1	1	7.8	191
T.2	Taxus buccata	12	500	1	6.5	4.5	4.6	3	Mat ure	Fair	Good	some minor deadwood, canopy over shed and touching roof, tree has been high pruned to 3m, epi on main stem	40+	B1	1	6	113

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T.1	Taxus buccata	12	500	5.2	6.5	1	4.6	3	Mat ure	Fair	Good	some minor deadwood, canopy over shed and touching roof, tree has been high pruned to 3m, epi on main stem	40+	B1	1	6	11 3
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Appendix II – Tree Categorisation Table (BS5837:2012)

Category and definition	Criteria (including subcategories where appropriate)			Identification on plan
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 a 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 their trees nearby, or very low quality trees suppressing adjacent trees of better quality. <i>(note: Category U trees can have existing or potential conservation value which it might be desirable to preserve)</i>			
Trees to be considered for retention				
	1. Mainly arboricultural qualities	2. Mainly landscape qualities	3. Mainly cultural values, including conservation	
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)	
Category B Trees of moderate quality with an estimated remaining life expectancy of at least 20	Trees that might be included in category A, but are downgraded because of impaired condition (e.g. presence of significant though remediable defects, including	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	Trees with material conservation or other cultural value	

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years	unsympathetic past management and storm damage), which that they are unlikely to be suitable for retention for beyond 40 years; or trees lacking the special quality necessary to merit the category A designation	collectives but situated so as to make little visual contribution to the wider locality		
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	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 benefits	Trees with no material conservation or other cultural value	

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Appendix III – Bibliography

British Standards Institution (2010). BS3998 Tree Work - Recommendations, Stationery Office, London

British Standards Institution (2012). BS5837 Trees in relation to design, demolition and construction - Recommendations. Stationery Officer, London



Appendix IV – About the author

Mr Reuben Hayes M.Arbor.A, MCMI

Qualifications

National Diploma (Tree Management and Arboriculture) (ND)
(2000) – Warwickshire College
Higher National Diploma, Arboriculture (HND), July 2003 –
Warwickshire College
CMI Management and Leadership (Level 5) – May 2015

Continued Professional Development

Professional Tree Inspection (PTI), July 2009 – Lantra Award
BS5837 – Trees in relation to Construction 2012 (refresher course)
2015
Mortgage report writing (refresher course) 2015

Membership of industry bodies

Professional Member of the Arboricultural Association - M.Arbor.A
Professional Member of Consulting Arborist Society (CAS)
Associate member of the Institute of Chartered Foresters
Chartered Management Institute – CMgr MCMI
Institute of Directors – (IoD)

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