

Appendix 2

Tree Survey Explanatory Notes

The survey of trees has been carried out in accordance with the criteria set out in Chapter 4 of *British Standard 5837:2012 Trees in relation to design, demolition and construction-Recommendations* (BS5837). The survey has been undertaken by the qualified and experienced arboriculturist detailed at Table 1 of this report and they recorded information relating to all those trees within the site and those immediately adjacent to the site which may be of influence to any proposals.

The results are recorded in the Schedule of Trees at Appendix 3.

Schedule of trees

Appendix 3 presents details of the individual trees, groups and hedgerows including heights, diameters at breast height, crown spread (given as a radial measurement of cardinal points from the stem), age class, comments as to the overall condition at the time of inspection, BS5837 category of quality and suitability for retention, and the root protection area information.

General observations particularly of structural and physiological condition for example the presence of any decay and physical defect and preliminary management recommendations have also been recorded where appropriate.

Details of the individual trees, groups and hedgerows

All trees were assessed for their quality and benefits within the context of proposed development in a transparent, understandable and systematic way.

Individuals

The default position is to record each tree as an individual for its unique contribution to the landscape

Groups and woodlands

Trees have been assessed as groups where it has been determined appropriate by the surveyor. The term group has been applied where trees form cohesive arboricultural features either aerodynamically, visually or culturally.

Hedges and shrub masses

We consider a hedgerow to typically comprise a line of trees or shrubs that currently is subject to, or has undergone, a pruning regime to contain its dimensions.

For the tree survey hedgerows and substantial internal or boundary hedges (including evergreen screens) have either been recorded in the Tree Schedule, including lateral spread, height and stem diameter(s), or indicated on the Tree Constraints Plan.

A tree survey in accordance with BS5837 does not assess hedgerows against *The Hedgerow Regulations 1997* or specifically from an ecological perspective, as such would be outside the scope of the British Standard assessment.

Shrub masses are collectives of woody plants, rather than trees, and are recorded where they are a significant feature of the site. They have either been recorded in the Tree Schedule or indicated on the Tree Constraints Plan.

Individual trees within groups, woodlands and hedges

An assessment of individual trees within the groups has been made where there has been a clear need to differentiate between them for example, in order to highlight significant variation between attributes including physiological or structural condition or where a potential conflict may arise.

BS5837 Categorisation

Trees have been divided into one of four categories based on Table 1 of BS5837, 'Cascade chart for tree quality assessment'. For a tree to qualify under any given category it should fall within the scope of that category's definition (see below).

Category U trees are those which would be lost in the short term for reasons connected with their physiology or structural condition. They are, for this reason not considered in the planning process on arboricultural grounds. Categories A, B & C are applied to trees that should be of material considerations in the development process. Each category also having one of three further sub-categories (i, ii, iii) which are intended to reflect arboricultural, landscape and cultural or conservation values accordingly.

Please note that the estimated remaining life expectancy figures are taken for BS5837 and relate to their categorisation. The life expectancy figures are therefore arbitrary and may vary in reality.

Category (U)

Trees that have a serious irremediable structural defect such that their early loss is expected due to collapse and includes trees that will become unviable after removal of other category U trees.

Trees that are dead or are showing signs of significant, immediate or irreversible overall decline.

Trees that are infected with pathogens of significance to the health and/ or safety of other nearby trees or are very low quality trees suppressing adjacent trees of better quality.

Certain category U trees can have existing or potential conservation value which may make it desirable to preserve.

Category (A)

Shown green on Tree Constraints Plan: Trees that are considered for retention and are of high quality with an estimated remaining life expectancy of at least 40 years and with potential to make a lasting contribution. Such trees may comprise:

Sub categories

- 1) trees that are particularly good examples of their species, especially if rare or unusual, or are essential components of groups such as formal or semi-formal arboricultural features for example the dominant and/or principal trees within an avenue.
- 2) trees, groups or woodlands of particular visual importance as arboricultural and/or landscape features.
- 3) trees, groups or woodlands of significant conservation, historical, commemorative or other value for example veteran or wood pasture.

Category (B)

Shown blue on Tree Constraints Plan: Trees that are considered for retention and are of moderate quality with an estimated remaining life expectancy of at least 20 years and with potential to make a significant contribution. Such trees may comprise:

Sub categories

- 1) trees that might be included in category A but are downgraded because of impaired condition for example the presence of significant though remediable defects, including unsympathetic past management and storm damage.
- 2) 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.
- 3) trees with material conservation or other cultural value.

Category (C)

Shown grey on Tree Constraints Plan: Trees that are considered for retention and are of low quality with an estimated remaining life expectancy of at least 10 years or young trees with a stem diameter below 150mm. Such trees may comprise:

Sub categories

- 1) unremarkable trees of very limited merit or such impaired condition that they do not qualify in higher categories.
- 2) trees present in groups or woodlands, but without this conferring on them significantly greater collective landscape value or trees offering low or only temporary/transient screening benefits.
- 3) trees with no material conservation or other cultural value.

Devising BS5837 root protection areas

Default situation

The root protection area is a function of the stem diameter, it is multiplied by 12 to give a radius. For multi-stemmed trees the stems are combined to provide an effective diameter figure which is then multiplied.

Initially the root protection area should be plotted as a circle, and in many situation it remains a circle.

Influenced situation

Adjustments to the root protection area are made where pre-existing site conditions that would influence root distribution are present. Typically this will be buildings and retaining walls, lighter structures such as hard surfacing, sheds and garages generally do not have the same influence.

Ponds, rivers and watercourses will also influence root distribution as waterlogged soils are not conducive to root growth. Rainwater attenuation and ditches are likely to have a lesser impact if they are dry for significant periods.

Veteran trees

Natural England have introduced Standing Guidance that requires the allocation of buffer zones to veteran (including ancient) trees. They have prescribed that a buffer zone of 15 times the stem diameter of the tree is allocated. This will result in a buffer zone of larger diameter than the root protection area. Where veteran trees are identified during the tree survey they are allocated a Natural England buffer zone on the Tree Constraints Plan.

The Guidance is silent on what can and cannot be done within the buffer zone but it is reasonable to assume that it is prescribed to avoid material harm to the tree. It is also silent on what can and cannot be done when the land within the buffer zone is previously developed.

With this added layer of protection it is important to establish if a tree is veteran or not. The Guidance was not intended to be applied to all mature trees but to the sub-set of trees that are of great age. This is analogous with the NPPF requirement to safeguard trees that have attained an age where they are worthy of veteran or ancient status.

It is therefore important to establish a basis for defining trees as veteran as opposed to those trees that may have veteran characteristics or those trees that are mature.

Stem size is a useful guide and, in combination with size, so are characteristics of the tree. If we consider the guidance on stem size being a suitable guide to classifying trees as veteran we see:

- a) The most up to date (2013) guidance is that in ¹*Ancient and other veteran trees: further guidance on management* edited by David Lonsdale and published by The Tree Council in conjunction with The Ancient Tree Forum. Lonsdale considers that many trees may have veteran characteristics at any age however proposes, at a species level, size thresholds when a tree may be considered a veteran. A chart (see Figure 1 below) lists, species by species, the size criteria for trees reaching veteran status and then moving on to the later, ancient stage of life. Of those species listed in the chart we only need consider oak. We see that until trees attain a stem girth of around 4.6m (equivalent stem diameter of 1.46m) then an oak is only considered to be 'Locally notable'
- b) A somewhat older (1999) publication, ²*Veteran Trees: A guide to good management* edited by Helen Read and published by English Nature et al, is very similar in its definition by setting out three distinct bands for oak trees:
 - i) those with a diameter of more than 1.0m are potentially interesting
 - ii) those with a diameter of more than 1.5m are valuable in terms of conservation
 - iii) those over 2.0m in diameter are truly ancient
- c) English Nature's own ³*Development of a veteran tree site assessment protocol (Report Number 628)* of 2005 sought to give more structure to grading sites where veteran trees were present. It considered that trees over 1.0m diameter could be classed as veteran.

¹ *Ancient and other veteran trees: further guidance on management* edited by [REDACTED] and published by The Tree Council in conjunction with The Ancient Tree Forum

² *Veteran Trees: A guide to good management* edited by Helen Read and published by English Nature et al

³ *Development of a veteran tree site assessment protocol (Report Number 628)* of 2005

In summary, a tree may enter its veteran stage at 1.0m diameter but a more reliable size threshold, as held out by the latest guidance on the matter, is 1.5m diameter.

The other factor, tree characteristics, is also worth considering as veteran tree characteristics can be found on even young trees. Of course, if we count every tree with veteran tree characteristics as veteran we do a disservice to those truly veteran trees that warrant protection.

Read (1999), as set out above, considers veteran tree characteristics as:

- large girth for species
- major trunk cavities or progressive hollowing
- naturally forming water pools
- decay hollows
- physical damage to trunk
- bark loss
- large quantities of deadwood within the crown
- sap runs
- crevices in the bark, under branches or on the root plate sheltered from direct rainfall
- fungal fruiting bodies
- high number of interdependent wildlife species
- epiphytic plants
- an 'old' look
- high aesthetic interest

Lonsdale (2013) adds to this list:

- progressive narrowing of successive annual increments in the stem
- changes in crown architecture
- progressive or episodic reduction in post-mature crown size, often known as retrenchment

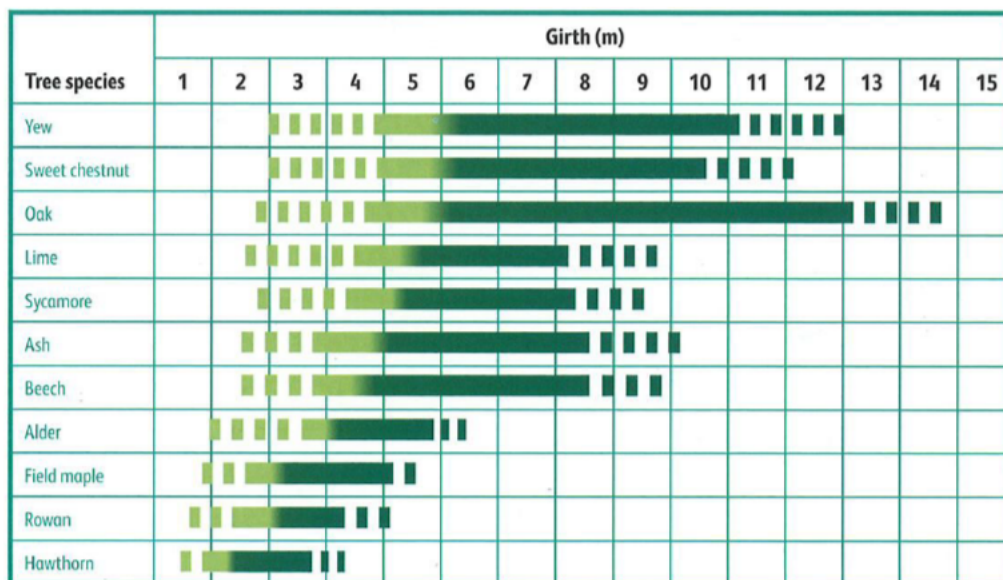
Lonsdale also states that "In order to qualify as a veteran, the tree should show signs of crown retrenchment and signs of decay in the trunk, branches or roots, such as exposed deadwood or fungal fruit bodies".

The English Nature Report Number 628 refers to Read (1999) for a list of veteran features but does add that in addition a tree may also:

- have a pollard form or show indications of past management
- have a cultural/historic value
- be in a prominent position in the landscape

These three criteria, when examined, are not truly indicative of a veteran tree on their own as these criteria could be applied to street trees in peri-urban locations that date from the mid-20th century - many of those are of pollard form, have cultural and historic value and a prominent position in the landscape.

In summary, it is important to consider the size of the tree and its characteristics. Just because a tree is mature does not mean it is veteran neither does the presence of veteran characteristics alone.



KEY:     Locally notable Veteran/notable Ancient Late ancient

Figure 1- Chart of girth in relation to age and developmental classification of trees