Arboricultural impact appraisal and method statement

The Windmill Pub & No 34 Mill Lane, Rustington, Littlehampton BN16 3JN

barrell
TREE CONSULTANCY

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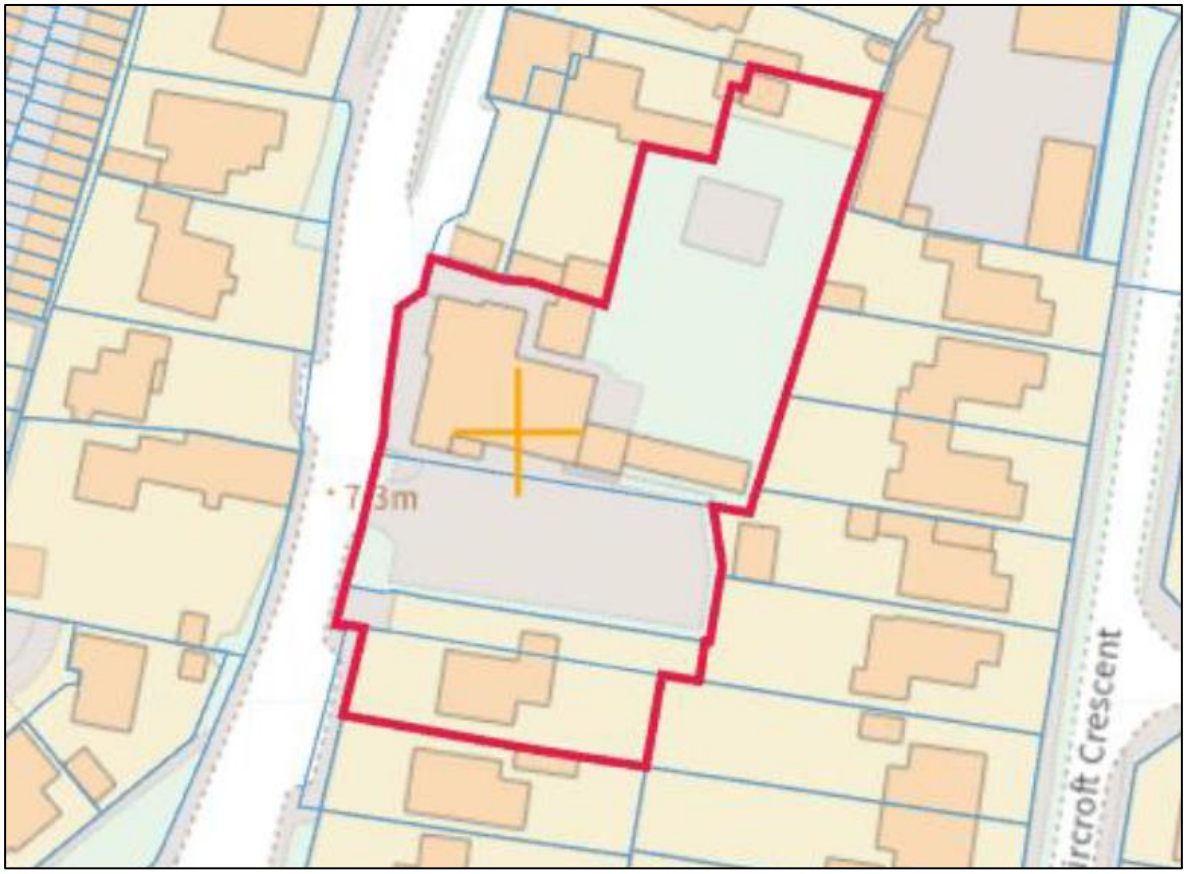
31th July 2024
24038-AIA2-PB

Site location and report purpose

Site location



This plan extract is supplied courtesy of Churchill Retirement Living. The red line shows the approximate site boundary and is for illustrative purposes only and should not be scaled or measured.

Report purpose

This arboricultural impact appraisal report provides sufficient information for the Local Planning Authority (LPA) to consider the effect of the proposed development on local character from a tree perspective. It is fully compliant with the BS 5837 advice relating to the planning application stage of the process and it meets national standard planning application validation requirements.

More specifically, the development proposal is to demolish the existing onsite structures at The Windmill Pub & No 34 Mill Lane, Rustington, Littlehampton BN16 3JN, and establish a twenty eight unit apartment complex and three cottages with onsite parking provision and landscaping.

This report includes:

- A **Tree protection plan** illustrating tree locations, categories, the location of the proposed development, and the proposed tree protection measures.
- An **Arboricultural impact appraisal** (section 1 of the report) providing an analysis of the tree issues to assist the LPA in assessing the impact on local character.
- An **Arboricultural method statement** (section 2 of the report) describing how retained trees will be protected and managed during the development activity.
- **Appendices** (**Appendix 1** – Background administrative information and data collection; **Appendix 2** – Tree schedule and explanatory notes; and, **Appendix 3** – QR Codes for Site Guidance Notes (SGNs).
- A companion document to supplement the main report titled ***Manual for managing trees on development sites*** **(Version 3.0)**, which provides explanations of how retained trees will be managed on site in the form of SGNs covering the relevant issues.

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1 Arboricultural impact assessment

1.1 Table 1: Summary of trees affected and protected by the proposal

From our review of the constraints and the proposed layout, our assessment of the impact on trees, both during and after development, and those that need protection using special precautions, is summarised in Table 1:

	British Standard 5837 Category		
	A (High quality)	**B (Moderate quality)**	**C (Low quality)**
Remove	None	T10	T1, T2, T11
Prune	None	None	None
Protect using special precautions See Notes below	None	T5, T6	T7, T8, T9
Post development pressure to fell	None	None	None

T = Tree

Note on types of protection: All retained trees will be protected during development by using robust barriers, and only those requiring special precautions to limit the impact of encroachment are listed in Table 1.

1.2 The impact of tree removals on local character

Trees T1 and T2

These two small trees are located at the western boundary of the site and are of low quality due to their condition and structural form. It is reasonable to hold them as insignificant in the wider setting and their proposed removal will have no detrimental impact on local character.

Tree T10

This tree is a marginal moderate quality tree due to its existing structural form and is unlikely to be sustainable in the long term at its current size and dimension. The potential impact on visual amenity and character arising from its proposed removal will be offset by the retention of other trees along the eastern boundary of the site. As a result, its loss is considered unlikely to result in an adverse impact on landscape character.

Tree 11

This tree has very poor structural form and an acutely asymmetric canopy. It does not contribute as a skyline feature within the broader locality and its proposed removal will have no adverse impact on landscape character or visual amenity.

1.3 The impact of tree pruning on local character

Other than pruning for normal maintenance, no trees will be pruned because of this development and so there will be no impact on local character for that reason.

1.4 The impact of works in precautionary areas

Our assessment of the impact of encroachment into RPAs that will be managed by special precautions, is as follows:

Tree T5, T6, T7, T8 and T9

There will be encroachment into the RPAs of these trees in the form of permeable no-dig surfacing. I have carefully reviewed the levels in these areas, and it is my opinion that it would be feasible to

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install custom designed no-dig specification surfacing without causing any significant disturbance to the RPAs. From my past experience of projects involving the implementation such surfacing approaches (www.barrelltreecare.co.uk/case-studies/SurfacingNearTrees.pdf), I am confident that this can be established without any long term detrimental impact on tree health, with the detail to be agreed as part of a planning condition. This surfacing solution is within the advice set out in BS 5837 (8.6) and would be appropriate in this situation.

In summary, if the guidance set out in SGN 7 *Excavating in RPAs* and SGN 9 *Installing/upgrading surfacing in RPAs* is observed, then I believe that the proposed works can be implemented without any long-term detrimental impact on tree health, and therefore local character. This new surfacing must be installed before any demolition or construction access (potentially incorporating a sacrificial wearing course to serve during the main construction phase), to prevent inadvertent damage to the RPAs from the construction activity.

Tree T5

A new mobility scooter store to be installed at the outer RPA extents of this tree. The store will be a lightweight structure and will incorporate and enclose an area of permeable 'no dig' surfacing to ensure that the existing soil profile conditions remain unchanged. All ground based supporting elements must have hand dug footings and any poured concrete must be prevented from contaminating the soil by using an impermeable hole liner. It is common to have to install such structures within RPAs and it can be done without any significant adverse impact on the retained tree. All works will be conducted in accordance with the guidance set out in SGN 4 *Pollution control,* SGN 7 *Excavating in RPAs*, and SGN 10 *Installing structures in RPAs*. Subject to this adherence it is my opinion that the proposed change can be implemented without any long-term detrimental impact on tree health, and therefore its contribution to visual amenity and local character.

Tree T9

This tree has an area of existing hard surfacing located within the northern extents of its RPA. It is planned to carefully remove all this surfacing and reinstate it as soft landscaping to improve the ground conditions as part of the site wide soft landscaping works. From my previous experience of similar situations, I am confident that this can be done without any long-term detrimental impact on tree health, with the detail to be agreed as part of a planning condition.

In summary, if the guidance set out in SGN 8 *Removing surfacing and structures in RPAs* and SGN 12 *Landscaping in RPAs* is observed, then I believe that the proposed works can be implemented without any long-term detrimental impact on tree health, and therefore local character. During the main phase of onsite construction this area will remain annexed within the defined construction exclusion zone.

1.5 Post development considerations

If trees are retained or planted too close to occupied buildings and / or garden amenity space, it is sometimes claimed that they can cause excessive shade or anxiety, which interferes with the normal use of the property. In extreme cases, this can result in pressure from future owners to fell or severely prune, thus reducing the long-term contribution of the trees to local character. The counter position to this is that the benefits from trees close to occupied areas significantly outweigh any disadvantages caused by shade or anxiety, so there can be a range of perspectives. It is also relevant that important trees can be protected using tree preservation orders, which come with an overarching presumption to retain protected trees unless the normal use of the property is harmed to a significant extent. There is little published evidence to support either of the extremes, which

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means that each case must be intelligently assessed on its own merits and interpreted in the context of the experience of the assessor.

In summary, I have considered the matters of overbearing relationships and daylight, and concluded that there are no trees close enough to the new buildings and their associated amenity space that are likely to interfere with their normal use.

1.6 New tree planting to enhance local character

To supplement retained trees and enhance local character, the project landscape architect has specified a comprehensive new tree planting scheme. I understand that the final selection of species, size and location are flexible and open to amendment, as appropriate. All new trees will be specified and planted in accordance with the recommendations in BS 8545 (2014) *Trees: from nursery to independence in the landscape –Recommendations*. These new trees would have the potential to reach a significant height without excessive inconvenience and be sustainable into the long term, significantly improving the potential of the site to contribute to local character.

1.7 Unanticipated upgrading of existing services or installation of new services

Retained trees may be adversely affected by the installation of new services and / or the upgrading of existing services if that work encroaches into their RPAs. However, it is often difficult to know the detail of service locations until the construction is in progress, and sometimes encroachment into RPAs is unavoidable. Where possible, the default approach must be to use any existing service runs and keep all new services outside RPAs. Where existing services within RPAs require upgrading, or new services must be installed in RPAs, great care must be taken to minimise any disturbance. Trenchless installation will be the preferred option, but if that is not feasible, any excavation must be carried out by hand according to the guidelines in SGN 11 *Installing services in RPAs*.

1.8 Summary of impact on local character

The proposed scheme ensures that the significant boundary tree cover is being retained, and none of the trees proposed for removal are prominent as skyline features in the wider setting. The limited tree loss that is proposed will be noticeable in the immediate vicinity immediately after the development is completed, but the comprehensive new landscaping proposals will rapidly mitigate those losses and integrate the new development with the existing context. It is reasonable to advance that there will be no adverse impact to local character in the wider setting in the long term.

The construction activity has the potential to adversely affect retained trees if proper protective measures are not taken. However, if adequate precautions to protect these retained trees are specified and implemented through the arboricultural method statement included in this report, then the development proposal will have no detrimental impact on the contribution of trees to local character.

For these reasons, we conclude that the proposed development would not cause an unacceptable or adverse impact on the character and appearance of the area from a tree perspective.

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2 Arboricultural method statement

2.1 Site Guidance Notes (SGNs)

This section of the report identifies which trees on this site will be protected and managed, and by what means. This site-specific summary is supplemented by more detailed explanations and descriptions of specific operations set out in the accompanying *Manual for managing trees on development sites*. That document is a compilation of 12 individual SGNs addressing the following tree protection and management issues that regularly arise in the construction phase of development:

- SGN 1 *Monitoring tree protection* (https://www.barrelltreecare/SGN-1-Monitoring-V3.pdf)
- SGN 2 *Fencing protected trees* (https://www.barrelltreecare/SGN-2-Fencing-V3.pdf)
- SGN 3 *Ground protection* (https://www.barrelltreecare/SGN-3-Ground-Protection-V3.pdf)
- SGN 4 *Pollution control* (https://www.barrelltreecare/SGN-4-Pollution-V3.pdf)
- SGN 5 *Site cranes & piling rigs* (https://www.barrelltreecare/SGN-5-Cranes-Rigs-V3.pdf)
- SGN 6 *Height restrictions* (https://www.barrelltreecare/SGN-6-Height-V3.pdf)
- SGN 7 *Excavating in RPAs* (https://www.barrelltreecare.co.uk/SGN-7-Excavation-in-RPAs-V3.pdf)
- SGN 8 *Removing surfacing and structures in RPAs* (https://www.barrelltreecare/SGN-8-Removing-Surfaces-V3.pdf)
- SGN 9 *Installing/upgrading surfacing in RPAs* (https://www.barrelltreecare/SGN-9-Installing-Surfacing-V3.pdf)
- SGN 10 *Installing structures in RPAs* (https://www.barrelltreecare/SGN-10-Structures-V3.pdf)
- SGN 11 *Installing services in RPAs* (https://www.barrelltreecare/SGN-11-Services-V3.pdf)
- SGN 12 *Landscaping in RPAs* (https://www.barrelltreecare/SGN-12-Landscaping-V3.pdf)

NOTE: Each individual SGN can be downloaded by using the links above and the QR Code links in Appendix 3.

2.2 Identification of areas to be protected

The tree protection plan shows the areas where protective measures are necessary. The barrier extents are shown by the heavy black dashed lines, with the construction exclusion zone behind as the lighter black diagonal hatch. The precautionary areas are shown by a yellow fill.

2.3 Arboricultural supervision

An arboricultural consultant will be appointed to advise on the tree management for the site and to attend:

- a pre-commencement meeting before any work starts;
- regular supervision visits to oversee the agreed tree protection, as agreed at the pre-commencement meeting; and
- further supervision visits, as necessary, to oversee any unexpected works that could affect trees.

The detail of how the arboricultural supervision will be carried out is explained in SGN 1 *Monitoring tree protection* in the accompanying Manual.

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2 Arboricultural method statement

2.4 Table 2: Summary of the site operations requiring arboricultural input

For this site, arboricultural input will be needed for the following operations:

Brief operation summary	Trees affected	Location of detailed explanations
Pre-commencement meeting: Meeting on site with all parties to agree protective measures, as described in SGN 1. Will be carried out before any significant site works begin.	All retained trees	SGN 1 *Monitoring tree protection*
Tree felling and pruning: Contractor will carry out agreed works as described in Appendix 2. Will be completed before any significant site works begin.	Fell trees T1, T2, T10 and T11	Appendix 2
Installing barriers: Agreed tree protection measures will be installed and checked, as described in SGN 2. Will be completed before any significant site works begin.	All retained trees	Tree protection plan, SGN 2 *Fencing protected trees*
Pollution control near retained trees: Any pollution control measures identified during risk assessment will be installed as described in SGN 4. Will be completed before any potential pollutants arrive on site.	All retained trees	SGN 4 *Pollution control*
Regular arboricultural supervision: Provision will be made to carry out and record agreed arboricultural supervision, as described in SGN 1.	All retained trees	SGN 1 *Monitoring tree protection*
Excavating in RPAs: These operations will be carried out as described in SGN 7.	T5, T6, T7, T8 and T9	SGN 7 *Excavating in RPAs*
Removing surfacing in RPAs: These operations will be carried out as described in SGN 8.	T5, T6, T7, T8 and T9	SGN 8 *Removing surfacing and structures in RPAs*
Installing/upgrading surfacing in RPAs: These operations will be carried out as described in the SGN 9.	T5, T6, T7, T8 and T9	SGN 9 *Installing/upgrading surfacing in RPAs*
Installing structures in RPAs: These operations will be carried out as described in SGN 10.	T5	SGN 10 *Installing structures in RPAs*
Installing services in RPAs: These operations will be carried out as described in SGN 11.	All retained trees	SGN 11 *Installing services in RPAs*
Landscaping in RPAs: These operations will be carried out as described in SGN 12.	All retained trees	SGN 12 *Landscaping in RPAs*
Removing tree protection: Protection can only be removed when there is no risk of damage to retained trees, as described in SGN 1.	All retained trees	SGN 1 *Monitoring tree protection*

The operations summarised in this table, and supplemented by the more detailed explanations set out in the SGNs and the rest of this document, form the arboricultural method statement for this site. The Site Manager will ensure that its details and any agreed amendments are known and understood by all site personnel. Copies of the agreed documents will be available on site. All personnel who could have an impact on trees will be briefed on the specific tree protection

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requirements as part of the site induction procedures. This requirement will be written into the site management documentation.

If unanticipated issues arise on site requiring work approved by the LPA, but not referenced in the above explanations, for example the unexpected need to install services in RPAs, or landscaping in RPAs, further guidance on how to manage them can be found in the accompanying Manual.

2.5 Construction method statement (heads of terms summary)

A construction method statement is a description of how operations that may affect trees will be carried out to minimise any adverse impact on them. The details of how the site will be managed are construction and contractual matters that can only be finalised once the post-consent detailed planning begins. For that reason, at this stage in the planning process, as explained in clause 5.5.6 of BS 5837, it is normally sufficient to list a heads of terms summary of the issues requiring more detailed consideration once consent is issued. On this site, those issues are likely to include:

1. Preparation of a written site management protocol for dealing with tree issues, to be incorporated into formal site management procedures, and to specifically include induction training for all operatives related to tree protection.
2. The order of work on site, including demolition and site preparation, the installation of protective measures (including no dig surfacing with sacrificial wearing course), the phasing of successive work locations, the reconditioning of existing surfacing, the installation of new structures/surfacing, the removal of hard surfacing and removal of installed tree protection, soft landscaping works and any necessary reinstatement.
3. Erection and maintenance of tree protection measures.
4. Who will be responsible for protecting the trees on site.
5. Detailed proposals for inspecting and supervising the tree protection.
6. How accidents and emergencies involving trees will be managed, including accidental damage to roots and their treatment.
7. Details of facilitation pruning and access into site. What size vehicles will be used under canopies and will large machinery be lifted over trees.
8. The parking arrangements for workers and visitors.
9. A schedule of emergency contact numbers relating to trees.
10. Areas for loading and unloading of materials and storage of materials and plant.
11. Where site facilities will be located and when will they be installed.
12. How machinery and equipment (such as excavators, cranes and their loads, concrete pumps and piling rigs) will enter, move on, work on, and leave the site.
13. Pollution control to specifically consider chemical storage and wheel washing facilities in relation to trees.
14. Recycling and storage of waste in relation to trees.
15. Details of earthworks, grading and mounding and removal of spoil, including any planned lowering or raising of ground levels.
16. Precise services locations, including the method of excavation when near trees.
17. How and when any temporary surfacing will be laid and removed.
18. Details of upgrading/establishing existing surfacing and areas where this will happen, including detailed and precise cross-sections where no-dig surfacing is to be installed.
19. Full detailing and specifications relating to soft landscaping and tree planting.

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Appendix 1: Background administrative information and data collection

A1.1 Table 3: Background administrative information

	Background administrative information
Report date & reference	31th July 2024; 24038-AIA2-PB
Tree protection plan reference	24038-3
Instructing client	Churchill Retirement Living
Instructions	Visit the site, assess the relevant trees, prepare a schedule of their details, describe the impact of the proposal on those trees and identify the tree protection issues in an arboricultural method statement with a tree protection plan.
Provided documents	• Topographical survey, drawing reference '**Churchill-Rustington-Mill lane-Final-2D Only.dwg**', received by email on 21st March 2024. • Layout, drawing reference '**20091RT_PL002.dwg**', received by email on 30th July 2024.
Report author and credentials	Phillip Brophy is a Chartered Forester (www.charteredforesters.org), and a Registered Consultant of the Arboricultural Association (www.trees.org.uk), and is fully qualified to undertake the assessments in this report (https://www.barrelltreecare.co.uk/who-we-are/)
Report limitations	• A formal check of publicly accessible information on 27th March 2024 confirmed that the site is not located within a designated conservation area and no tree preservation orders are extant at or immediately adjacent to the site. If any tree works are proposed before a planning consent is given, then a further contemporaneous check on this status should be made with the LPA. • This report does not consider ecological or archaeological issues, or any other matter beyond the assessment of the trees. • This report does not constitute a tree hazard assessment. Where concerns for tree health and safety exist the necessary and appropriate tree inspections should be carried out.
Technical references	In preparing the analysis in this report, we considered the guidance and advice in the following technical references: • Climate Change Act (2008) www.legislation.gov.uk/ukpga/2008/27/contents • Town and Country Planning Act 1990 www.legislation.gov.uk/ukpga/1990/8/contents • National Planning Policy Framework, published by the MHCLG www.gov.uk/government/publications/national-planning-policy-framework--2 • BS 5837 (2012) *Trees in relation to design, demolition and construction – Recommendations*, https://shop.bsigroup.com/ProductDetail • BS 8545 (2014) *Trees: from nursery to independence in the landscape – Recommendations*, https://shop.bsigroup.com/ProductDetail • BS 3998 (2010) *Tree work – Recommendations*, BSI https://shop.bsigroup.com/ProductDetail • *Trees in the Townscape: A Guide for Decision Makers*, published by the Trees & Design Action Group http://www.tdag.org.uk/ • *Trees in Hard Landscapes: A Guide for Delivery*, published by the Trees & Design Action Group www.tdag.org.uk/ • National Joint Utilities Group (2007) Volume 4, Issue 2: *Guidelines for the planning, installation and maintenance of utility apparatus in proximity to trees* http://streetworks.org.uk/resources/publications/

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Appendix 1: Background administrative information and data collection

	Background administrative information
BS 5837 compliance	This report is BS 5837 compliant. *BS 5837 (2012) Trees in relation to design, demolition and construction – Recommendations* is 10 years old. Since its publication, there have been significant advancements in technology and thinking, informed by a decade of practical experience of putting principles into practice. In the document Foreword, it states: *"Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations"*. This statement provides the opportunity for practitioners to claim compliance while moving best practice forward in the context of emerging technology, ideas, and experience. Although much of the BS 5837 content remains relevant and useful for managing trees in a planning context, there are now several aspects that are dated, and it is no longer appropriate to rigidly apply them to current planning submissions. Barrell Tree Consultancy (BTC) specialises in managing trees on development sites and retains a complete paper archive of every project it has carried out since starting business in 1980, with a digital data base listing those from 2004. In the decade since BS 5837 was published (April 2012), interrogation of the BTC archive confirms that we have been involved in a total of 3,884 projects, of which we estimate that about 3,845 were development related, and it is that depth of experience that informs the following statements on BS 5837 compliance. All BTC reports are prepared to be BS 5837 compliant and, although explanations are not explicitly required to claim compliance, the justifications for any deviations from its recommendations are set out below, referenced by the BS clause number: 1. **4.3 – soil assessment:** All BTC consultants have basic training relating to soil assessment and regularly deal with soil issues during their daily work, but none are soil specialists and BTC has no specialist investigation equipment for carrying out the type of soil assessment listed in this BS clause. In a modern development context, it is not for arboricultural consultants to demand or carry out professional soil investigations, and BTC does not do that. However, we will review soil information provided from appropriate specialists, if available, and incorporate that into our assessments. 2. **4.4.2.1 – tagging trees:** In some instances, it is not appropriate to tag trees, e.g., sensitive species, trees that are easily identified without a tag, inadequate access, project confidentiality, client instructions to the contrary, etc, and so although there will be a presumption to tag trees where feasible and appropriate, that may not be possible or necessary in every instance. 3. **4.4.2.5 *e*) – branch spread:** BTC only work from provided topographical surveys and where the branch spreads are shown correctly on those surveys, there is not normally any practical need to regurgitate that information in a schedule. Additionally, in closely spaced groups or in treacherous terrain, it is sometimes not safe or realistically possible to collect this data for every tree. For these reasons, BTC normally only collects crown spread data to the four cardinal points where the provided topographical survey is assessed as unreliable, or where a full

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	Background administrative information
	canopy cover assessment is requested, and it is both safe and practically feasible to do so. 4. **4.4.2.5 *f*) – branch and canopy height:** In the absence of any definition of '*canopy*' or '*significant*' relating to branches in the *Terms and definitions* clause, and the lack of any practical guidance for reliably assessing these characteristics, BTC has adopted the following default position. We will only identify the height and orientation of branches where they have the potential to be damaged by vehicular access, i.e., below a height of 6 m, or where their removal would be beyond what the tree could tolerate during normal maintenance management, i.e., the branch removal would significantly adversely affect the health of the tree and potentially compromise its current safe useful life expectancy. 5. **4.4.2.5 *g*) – life stage:** BS 5387 offers examples, but no definitions of what those examples mean. In the absence of a specific BS 5837 recommendation, BTC has reviewed the concept of maturity in a planning context, taking maturity to be a simplistic indication of a tree's ability to cope with change and its potential for further growth. For the purposes of development site advice, BTC conceptualises useful life-stage descriptions as; **young** indicating a potential to significantly increase in size and a high ability to cope with change; **maturing** indicating some potential to increase in size and a medium ability to cope with change; and, **mature** indicating little potential to increase in size and low ability to cope with change. 6. **4.4.2.5 *i*) – estimated remaining contribution:** BTC accepts the category recommendations in Table 1 on the remaining contribution in the context of category, i.e., greater than 40 years for A trees, greater than 20 years for B trees, at least 10 years for C trees, and less than 10 years for U trees, and so this is also not listed separately in the schedule. 7. **4.5.4 – subcategories:** BTC adopts a presumption that all trees are subcategory 1 (Mainly arboricultural qualities) unless noted to the contrary, and so for conciseness and to avoid complication, the subcategory is not listed in the schedule unless it is 2 or 3. 8. **Table 2 and 4.4.2 – colour coding:** The colours included in this table take no account of the inability of some people to distinguish between red and green, which is not helpful to people suffering with this form of colour blindness. To address this discriminatory failing with the BS approach, BTC has adopted a more intuitively obvious regime of green and blue colours, which can be easily distinguished by colour-blind people, with the best category A and B trees (High and moderate quality) being green, and the lower category C and U trees (Low quality and unsuitable for retention) as blue. The differentiation between the two categories in each colour is provided by symbols rather than using different colours. This is clearly shown on the plan key, so there can be no doubt about what category a tree is, which is an intuitive approach to avoiding discrimination of colour-blind people. In any event, the tree

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	Background administrative information
	category is now included next to each number, so there can be no question about the category and BS 5837 compliance. 9. **5.2.1 – RPAs:** This clause recommends that the RPAs for category A, B, and C trees are shown as the existing constraints on the plans used in the "*concept and design*", i.e., the tree constraints plan. However, the BS does not explicitly recommend that all those constraints are shown on the tree protection plan, which is logical because only category A (High quality), and category B (Moderate quality) trees can realistically be material constraints, with category C (Low quality) and category U (Unsuitable for retention) trees obviously unsuitable to be determinative of the final design. Although it is not a BS recommendation to include the RPAs of category C trees on the tree protection plan because they cannot be material constraints, it is sometimes helpful as an informative to be able to see them if category C are planned for retention to assess if that is feasible. For that reason, BTC tree protection plans show the RPAs of category C trees as a thin grey line rather than the thicker grey line denoting category A and B RPAs. 10. **5.2.2 Notes 1 and 2 – shading:** These notes offer general information on how shading can be assessed, which is presented in italics. The implications of the convention of using italics within the BS is set out in the Foreword as: "*Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.*" Our interpretation of that statement is that the application of Notes 1 and 2 is not part of the BS recommendations, and is not necessary for BS 5837 compliance. In our experience, the assessment of daylight issues is a specialist discipline and way beyond our expertise as arboriculturists, and so we would defer to an appropriate specialist, where any detailed guidance is required.

A1.2 Table 4: Data collection

	Data collection
Date of site visit	27th March 2024
People present during site visit	Phillip Brophy
Weather & visibility	Dull and damp with average visibility
Limitations to observations	• The inspection of the trees for the purposes of assessing their condition and work requirements was made on the basis that they will be annually inspected in the future to identify any changes in condition and review the original recommendations. For these reasons, the tree assessment advice only remains valid for one year from the date that the trees were last inspected. • All observations were of a preliminary nature and did not involve any climbing or detailed investigation beyond what was visible from accessible points at ground level. • Observations of trees outside the site boundaries are confined to what was visible from within the site. • All dimensions were estimated unless otherwise indicated.

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Appendix 1: Background administrative information and data collection

	Data collection
Statutory protection through Tree Preservation Orders and Conservation Areas	A formal check of publicly accessible information on 27th March 2024 confirmed that the site is not located within a designated conservation area and no tree preservation orders are extant at or immediately adjacent to the site. If any tree works are proposed before a planning consent is given, then a further contemporaneous check on this status should be made with the LPA.
Tree location and numbering	Each tree was inspected, and the numbering scheme is shown on the tree protection plan.
Crown spreads	Crown radial spreads were estimated to the nearest metre and represent our assessment of the viable crown dimensions that would be retainable after normal management. For clarification, the viable crown spread is the size of the main body of the crown, and not necessarily the furthest extent of odd branches that extend out beyond this core of the crown.
Recording of tree data	For each identified tree, the information collected was recorded on the tree schedule in Appendix 2 and the tree protection plan.
Calculation of RPAs	The RPAs were calculated as recommended in BS 5837, and the nominal RPA radius for each tree is listed in the tree schedule in Appendix 2. Where appropriate, RPAs for trees on the site were adjusted as recommended in BS 5837 and illustrated on the plan.

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Appendix 2: Tree schedule and explanatory notes

NOTE: Colour annotation is B trees with green background; C trees with blue background; trees to be removed in red text.

Tree No	Species	Height (m)	Diameter (cm) @ 1.5 m	Maturity	Low Branches	Category	Notes	Tree Works	RPA Radius (m)
All retained trees								Carry out safety check and lift over site to 3-4 m as necessary.	
T-1	Holly	2	15	Young		C		Fell	2.2
T-2	Holly	4	32.5	Maturing		C	Ornamental within residential frontage	Fell	2.3
T-3	Scots pine	4	30*	Maturing		C	Not shown on original topo, location approximate. Squat form tree located within adjacent garden.		6.6
T-4	Elder	1	15	Young		C			8.4
T-5	Hornbeam	9	57.5*	Mature		B	Marginal B tree due to boundary prominence and past reduction pruning		6.6
T-6	Hornbeam	13	72.5	Mature		B			6.4
T-7	Cypress	15	45*	Maturing		C	Located within adjacent garden		6.8
T-8	Rowan	7	30	Mature		C			7.4
T-9	Ash	15	67.5	Over mature		C	Poor structural form, areas of past branch fracture and potential current weakness		6.8
T-10	Hornbeam	14	75	Mature		B	Marginal B category tree due to structural form	Fell	2.6
T-11	Hornbeam	9	65	Over mature		C	Poor structural form and clear reduction in vitality	Fell	2.6

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Appendix 2: Tree schedule and explanatory notes

Explanatory Notes

- **Abbreviations:**
  T: Tree

- **Botanical tree names:**

Ash	: *Fraxinus excelsior*
Cypress	: *Cupressus* sp
Elder	: *Sambucus nigra*
Holly	: *Ilex aquifolium*
Hornbeam	: *Carpinus betulus*
Rowan	: *Sorbus aucuparia*
Scots pine	: *Pinus sylvestris*

- **BS 5837 (2012) compliance:** All data has been collected based on the recommendations set out in subsection 4.4 of BS 5837.
- **Tree checks and site limitations:** Each tree was subjected to a quick visual check level of inspection. Where there is restricted access to the base of a tree, its attributes are assessed from the nearest point of access. Climbing inspections are not carried out during this level of inspection and, if heavy ivy is present, tree condition is assessed from what can be seen from the ground. A separate note is recorded if further investigation may be required to clarify its status.
- **Crown spreads:** Crown radial spreads were estimated to the nearest metre and represent our assessment of the viable crown dimensions that would be retainable after normal management. For clarification, the viable crown spread is the size of the main body of the crown, and not necessarily the furthest extent of odd branches that extend out beyond this core of the crown.
- **Dimensions:** All dimensions are estimated unless otherwise indicated with an asterix (*) after the figure.
- **Species:** Species identification is based on visual observations. Where there is some doubt over tree identity, sp is noted after the genus name to indicate that the species cannot be reliably identified at the time of the survey. Where there is more than one species in a group, only the most frequent are noted and not all the species present may be listed.
- **Height:** Height is estimated to provide a broad indication of the size of the tree.
- **Trunk diameter:** Trunk diameter is estimated or measured (with a diameter tape), at the discretion of the consultant. Estimates may be made where access is restricted, direct measurement is prevented because of ivy on the trunk, or the tree is assessed as low quality. The point of measurement and the adjustments for stem variations are as advised in Figure C1 of BS 5837. Individual diameters for multiple stems are recorded in the notes, with the calculated cumulative diameter recorded in the diameter column.
- **Maturity:** In planning context, maturity provides a simplistic indication of a tree's ability to cope with change and its potential for further growth. For the purposes of this report, young indicates a potential to significantly increase in size and a high ability to cope with change, maturing indicates some potential to increase in size and a medium ability to cope with change, and mature indicates little potential to increase in size and limited ability to cope with change.
- **Low branches:** Any low branches that would not be feasible for removal during normal management and should be considered as a design constraint are noted here and explained in the notes.
- **Category:** Our assessment automatically considered tree physiological/structural condition (BS 5837, 4.4.2.5*h*), and so these are not listed separately in the schedule. Additionally, the category accounts for the remaining contribution (BS 5837, 4.4.2.5*i*) as greater than 40 years for A trees, greater than 20 years for B trees, at least 10 years for C trees and less than 10 years for U trees, so this is also not listed separately in the schedule. Category A, B and C trees are automatically listed as sub-category 1 unless otherwise stated.
- **Notes:** Only relevant features relating to physiological or structural condition and low branches that may help clarify the categorisation are recorded. If there are no notes, then the presumption should be that no relevant features were observed.
- **Tree works:** The recommended tree works are based on the quick visual check level of inspection and only intended to address significant hazards identified during that inspection. The following points should also be considered before carrying out any works:
  1. **Reporting during work operations:** In the context of the preliminary nature of the tree inspection, any defects that may affect tree safety discovered by the contractor when carrying out the work recommendations should

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be reported to the supervising officer. Modification to the schedule of works may be required because of these reports. The contractor should be specifically instructed on this point.

2. **Implementation of works:** All tree works should be carried out to BS 3998 *Recommendations for Tree Work* as modified by more recent research. It is advisable to select a contractor from the local authority list and preferably one approved by the Arboricultural Association. Their Register of Contractors is available free from The Malthouse, Stroud Green, Standish, Stonehouse, Gloucestershire GL10 3DL; phone 01242 522152; website www.trees.org.uk.
3. **Statutory wildlife obligations:** The Wildlife and Countryside Act 1981 as amended by the Countryside and Rights of Way Act 2000 provides statutory protection to birds, bats and other species that inhabit trees. All tree work operations are covered by these provisions and advice from an ecologist must be obtained before undertaking any works that might constitute an offence.
4. **Stumps:** Stumps to be removed within the RPAs of retained trees should be ground out with a stump grinder to minimise any disturbance unless otherwise authorised by the supervising officer.

- **RPAs:** The RPAs were calculated as recommended in BS 5837, and the nominal RPA radius for each tree listed, irrespective of any modifying factors. Where appropriate, RPAs for trees on the site may have been adjusted as recommended in BS 5837 and illustrated on the plan.
- **Future tree safety inspections:** Due to the time that may elapse between the original survey and the start of development, all trees should be re-inspected as part of the standard risk management process before any works start on site. Our assessment of the trees was carried out on the basis that a re-inspection would be carried out within a year of the assessment visit and our advice on tree condition must be reviewed annually from the date of that visit.

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Appendix 3: QR Codes for SGNs (Scan with reader to download)

SGN 1 *Monitoring tree protection*	SGN 2 *Fencing protected trees*	SGN 3 *Ground protection*
SGN 4 *Pollution control*	SGN 5 *Site cranes & piling rigs*	SGN 6 *Height restrictions*
SGN 7 *Excavating in RPAs*	SGN 8 *Removing surfacing and structures in RPAs*	SGN 9 *Installing/upgrading surfacing in RPAs*
SGN 10 *Installing structures in RPAs*	SGN 11 *Installing services in RPAs*	SGN 12 *Landscaping in RPAs*

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