

Trees and Construction

BS5837 Tree Survey Assessment

Site: Land off Mercury Way, Skelmersdale

Ref: 21676/A1

Client: John McCall Architects



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Revision	Description	Date
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1. INTRODUCTION

- 1.1 **Instruction:** This advice has been prepared for John McCall Architects (hereafter; client) and is in respect of the tree related planning considerations at Land off Mercury Way, Skelmersdale (hereafter; site).

As the proposal relates to development works at site, the advice herein is produced in accordance with the British Standard 5837 : 2012 '*Trees in Relation to Design, Demolition and Construction - Recommendations*' (hereafter; BS5837).

- 1.2 **BS5837:** The scope of BS5837 is to provide guidance on how trees and other vegetation can be integrated into construction and development design schemes. The overall aim is to ensure the protection of amenity by trees which are appropriate for retention.
- 1.3 **Scope of this advice:** This advice has been produced in accordance with BS5837 and is intended to demonstrate the site's realistic arboricultural constraints and assist with the design process. The objective is to systematically assess the site and provide suitable recommendations regarding the proposal's potential impact on trees and vice versa.
- 1.4 Following instruction the consultant surveyed the site on the 29th June and 28th September 2021 where a site walkover and BS5837 tree survey were carried out; all trees on site and around the application boundary were surveyed from ground level and plotted as either an individual or a tree group.
- 1.5 This advice is subject to caveat at Appendix I, outlines relevant terms and definitions at Appendix II and constitutes the findings of the preliminary site assessment and associated arboricultural recommendations.
- 1.6 The survey data and site observations use the supplied topographical survey to illustrate the surveyed trees in plan format as a 'Tree Constraints Plan' (hereafter; TCP); the TCP and the tree survey data table are at Appendix III.

2. SITE INFORMATION & TREE ASSESSMENT

- 2.1 The site currently comprises a disused site split between a disused building with associated access, parking and hard and soft amenity space, and an open field with tree growth mainly in collective canopy groups.
- 2.2 **Proposal:** No detailed scheme is available for comment at this stage. However, it is understood that the site is being considered for development. As such, the considerations herein surround the principal of development in respect of trees and tree retention / protection recommendations.
- 2.3 The site requires consideration from an arboricultural perspective due to the presence of trees on and around the site; these trees are deemed to be within impacting distance of the existing property and potential construction area.
- 2.4 The trees -
- 2.4.1 The tree survey and assessment resulted in the BS5837 quality/retention categories of 'A - high', 'B - moderate' and 'C - low' being attributed to trees/tree groups as well as those categorised as 'U' for those dead, dying or dangerous trees needing to be removed.
- 2.4.2 The BS5837 tree survey is a means of objective assessment and reflects the trees' condition, quality contribution, remaining life expectancy and spatial considerations (stem, crown and roots). On this basis and in order to consider the trees' accurate constraints, the survey data has the crown extents for north, east, south and west, the stem diameter measurement, and the calculated root protection areas (hereafter; RPAs). Hereafter, the trees are therefore reviewed and considered on their own merits and in line with the guidance of BS5837.
- 2.4.3 There are identified defects to the surveyed trees, this has resulted in the recommendation for tree removal, i.e. the category 'U' trees. Thereafter, general site inspections and tree works will be required for H&S tree risk management.

3. FINDINGS & RECOMMENDATIONS

3.1 The following information, as with the prior contents of this report, should be read with the appended tree data table and tree constraints plan (21676/TCP/01).

3.2 General Considerations for Tree Retention / Removal

3.2.1 Due to the poor condition and defects noted to the trees categorised as 'U' it is recommended that these be removed as part of health and safety tree risk management i.e. T13, T23, T25.

3.2.2 There are smaller scale trees and those with defects or limitations on the current amenity contribution or useful remaining life expectancy, these are categorised as 'C - low'.

These 'C' category trees should not constrain nor significantly guide a scheme, although protection may be preferable to retain landscape function and maturity. For any proposed tree removals, mitigation tree planting is recommended as part of a landscape scheme and can suitably replace and enhance the initial loss of canopy cover.

3.2.3 The moderate quality 'B' category trees are noted as such due to their fair future potential and fair current amenity contribution. These should be retained and protected where possible as part of the site's development.

Whilst the retention and protection of 'B' category trees is recommended, the removal of some may also be mitigated. Subject to supplementary details for tree selection as part of a well delivered landscape scheme, proposals of this nature may then be accepted by the council. However, this will require higher grade larger nursery planting stock than that to mitigate the removal of 'C' category trees.

3.2.4 Based on the individual prominence, lack of significant defects, current contribution and/or future potential of T22, this is categorised as 'A - high'. It is recommended that this tree be retained, protected and be clear of the proposal. This is best achieved by avoidance where its crown and RPA are accommodated in the design and layout.

3.3 Tree Protection

3.3.1 The design and layout of the site is to incorporate the essential components of retained trees (crown and rooting area) and provide a suitable level of clearance to allow for their long term safe retention, i.e. RPA protection and crown clearance as well as for any new tree(s) being planted.

- 3.3.2 Depending on the level of tree retention/removal, the protection methods for the retained trees is likely to vary. However, it is likely that a combination of construction restrictions be used with protective barrier fencing (to protect RPAs).

The process of site operations will be an important aspect to confirm by way of a construction layout plan, i.e. showing storage areas, parking, delivery area, access routes etc., all outside of RPAs or with a provision for ground protection. As a basis for tree protection the following points will need to be considered:

- Removal of all agreed trees and any agreed pruning works prior to works commencing by a suitably qualified arboricultural contractor;
- Induction of construction personnel regarding the exclusion of works (including access and storage) from the retained trees' RPAs;
- Secure temporary barrier fencing around the site to exclude the retained tree's crowns and RPAs from the working site;
- The storage of materials clear of all retained trees and conditions to ensure no contamination/run-off into soils in proximity to trees or on higher ground; and
- For the removal of existing structures and/or hard surfaces from RPAs the works to be undertaken separate to construction, manually and sensitively.

3.4 General Overview

- 3.4.1 The considerations for trees which are to be retained as part of the proposal need to be addressed in order to ensure their protection. This is to account for the potential impact on retained trees and their growing environment from the proposed development and vice versa (these follow).

Tree Works

Any trees which are to be removed should be well indicated to ensure that the retained trees are suitably protected. Hence, all trees which are to be removed are to be marked by a suitably qualified person [spraying the stems with a cross] prior to tree works.

Tree Crowns

Consideration is required for both existing and newly planted trees whereby the proposed construction should take account of trees reaching their full growth potential. It is always prudent to provide adequate clearance from a tree's current crown for future growth, i.e. to allow a tree adequate space to reach maturity without conflicts with new structures.

Root Protection Areas (RPA)

As a minimum it would be suitable to consider the outer extents of retained trees' RPAs as construction exclusion zones and be protected.

As above, it is *sometimes* possible to undertake construction activities within the rooting areas of retained trees which requires greater attention to tree protection, foundation designs, phasing of works etc. If it is proposed to undertake works within these areas, more specific advice should be sought from a qualified arboriculturalist with a view to assessing the feasibility of said proposal and forming a suitable method statement.

Demolition/Excavation Works

Any removal of existing built structures (including stairways, small outbuildings, retaining walls etc.) or hard surfacing will need to be undertaken with great care where this occurs within or near to the anticipated rooting areas of retained trees.

Said works should adhere to the RPA restrictions, be undertaken manually with hand held non mechanical tools and ensure that existing ground levels are retained.

Hard Landscape Works

As with previously mentioned arboricultural restrictions to demolition/construction, the proposed works should avoid retained trees' RPAs. However, where ground works are proposed within RPAs, construction methods [for hard surfacing, walls etc.] should retain the existing ground levels, be undertaken sensitively and using a no dig design.

Conversion of soft surfaced areas within RPAs to hard surfaced walkways, parking areas etc., will need to utilise a no-dig product to ensure no negative impact on the tree roots and/or growing conditions.

- 3.4.2 For any proportion of tree removal, new tree planting is to be integrated into a landscape scheme. The new trees should be of a suitable volume, species, scale, in suitably prepared planting locations with adequate space for future growth and development and enhance the site's long term amenity contribution.

Planting Species and Volume

New tree planting should incorporate a range of species, select mixed characteristics and take account of the availability of space, i.e. concentrate on selecting suitable scale species based on the ultimate growth extents.

Planting Specification

A detailed specification should be included within a landscape scheme (could form part of planning conditions). This should outline the proposed tree species, stock selection, location, planting process and ongoing maintenance (watering, mulch and pruning).

Planting Location

The new planting sites should take account of the future growth potential of the chosen species and should allow for the amenity space to be utilised, minimise the potential conflict with structures and facilitate the contribution to amenity from the site.

3.5 Additional Details

- 3.5.1 The surveyed trees have been subject to a detailed inspection and the arboricultural considerations detailed within this advice. The advice herein is intended to guide a suitable design in consideration for the site's valuable amenity assets.
- 3.5.2 Further to the above, the finer details of layout, design detail to accommodate trees and any proposed new tree planting are to be illustrated within a landscape plan. This is to include the exact details of hard and soft landscape works, RPA sections (where surface works are proposed) and details of new tree planting location, species, stock selection, installation and maintenance; to be undertaken by the appointed landscape architect with the full support of the arboricultural consultant (where required).
- 3.5.3 Hence, further to the supply of the proposed site plan for the planning application, this will be reviewed as an arboricultural impact assessment (AIA) to inform AMS 'consideration'. Where this advice is accounted for, this will enable the arboricultural constraints to be managed effectively, i.e., phased works, tree protection fences etc.

This concludes our advice.

Caveat

Any and all information supplied to Indigo Surveys Ltd by/on behalf of the client is assumed to be accurate unless otherwise informed. | This advice is limited to the observations made on the date of inspection as detailed herein and any deletion, editing or alteration will result in the advice being null and void in its entirety. | This advice in its entirety may be deemed null and void if remedial works are undertaken on any area of the site, on or after the date of the survey. | No liability is assumed by the author or by Indigo Surveys Ltd for any misuse, misinterpretation or misrepresentation of this advice. | This advice is not valid in adverse or unpredictable weather conditions or for any failure due to 'force majeure' or unpredictable events. | No responsibility is assumed either by the author of this advice or by Indigo Surveys Ltd for any legal matters that may arise as a consequence. | Neither the author nor Indigo Surveys Ltd will be required to attend court or give testimony as part of this agreement. | The responsibility for any works undertaken on the basis of the recommendations of this advice does not form part of this agreement.

Appendix II

Terms and Definitions

“Arboriculturist” - person who has, through relevant education, training and experience, gained expertise in the field of trees in relation to construction.

“Competent Person” - person who has training and experience relevant to the matter being addressed and an understanding of the requirements of the particular task being approached.

“Topographical survey” - an accurately measured land survey undertaken to show all relevant existing site features. *A method of carrying out topographical surveys is given in RICS specification* Surveys of land buildings and utility services at scales of 1:500 and larger.

“BS5837 Tree survey” - should be undertaken by an arboriculturist to record information about the trees on or adjacent to a site. The results of the tree survey, including material constraints arising from existing trees that merit retention, should be used (along with any other relevant baseline data) to inform feasibility studies and design options. For this reason, the tree survey should be completed and made available to designers prior to and/or independently of any specific proposals for development.

“Tree categorisation method” - trees should be categorised in accordance with the BS5837 cascade chart by an arboriculturist. This is to identify the quality and value (in a non-fiscal sense) of the existing tree stock, allowing informed decisions to be made concerning which trees should be removed or retained in the event of development occurring.

“Root protection area (RPA)” - 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, shown as an arboricultural constraint in m². The radius is calculated using the BS5837 calculation method. An arboriculturist may change the shape of an RPA but not reduce its area.

“Arboricultural implications assessment” - 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.

“Arboricultural method statement” - methodology for the implementation of any aspect of development that is within the root protection area, or has the potential to result in loss of or damage to a tree to be retained.

“Tree protection plan” - a scale drawing, informed by descriptive text where necessary, based upon the finalised proposals, showing trees for retention and illustrating the tree and landscape protection measures.

Appendix III

Data Table: As appended (BS5837 Tree Survey Key & Table)

Tree Constraints Plan: As appended (21676/TCP/01)