



ARBORICULTURAL SURVEY
(BS 5837:2012)

FOR
PROPOSED DEVELOPMENT

AT

DALES COUNTRY CLUB
OKELL DRIVE
HALEWOOD
LIVERPOOL
L26 7XB

November 2023

Job Number 5326

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Disclaimer

The tree(s) referred to in this report are living entities and are therefore subject to natural processes. They will also be subject to changes to their environment caused by human's activities and to exceptional weather conditions. The inspection undertaken by our qualified staff relies on visual attributes of tree health and structure which can be assessed from a ground based inspection. Hidden defects which are not readily visible may not be detected. We therefore cannot wholly guarantee the condition and safety of the trees inspected beyond what can be reasonably assessed from the procedure used. We would recommend that the trees are regularly inspected and our staff will advise on the suitable frequency of these inspections.

1.0 INTRODUCTION

1.1 Professional Details

- 1.1.1 My name is Peter Murray and I am working on behalf DEP Landscape Architecture Ltd as an Arboricultural Consultant. I have been working and studying in the Arboricultural Industry since 1989. I have many years practical and consulting experience as a Local Authority arboriculturalist and a private sector practitioner.
- 1.1.2 I so far hold the Higher National Diploma in Arboriculture and am a professional member of the Arboricultural Association. I keep up to date with the latest research and best practice by attending relevant courses and seminars.

1.2 Tree Survey

- 1.2.1 We were recently instructed by MID Developments to carry out a site visit at Dales Country Club, Okell Drive, Halewood, Liverpool, L26 7XB and survey all significant trees that may be affected by development proposals in accordance with *BS 5837:2012 trees in relation to design, demolition and construction – Recommendations*.
- 1.2.2 The survey on which the findings of this report are based was undertaken on Tuesday 31st October 2023 and the weather was inclement.
- 1.2.3 This report should be read in conjunction with the attached Arboricultural Data and Site Plans of Appendix B and F.
- 1.2.4 The trees were inspected from ground level only and all comments and recommendations made have taken into account their location, surroundings and likely impact on persons or property.
- 1.2.5 The limitations of this report are restricted to the persons, time, information made available and purpose for which this report has been prepared. This report does not deal with any existing tree root/building conflicts and no information has been provided regarding soil type and no analysis undertaken by this company.

2.0 FINDINGS

2.1 The Site & Proposal

- 2.1.1 The site in question is a disused and derelict club building within a sub-urban area. Some of the land attached to the site is rapidly populating with self-sown scrub trees.
- 2.1.2 The proposal is for the demolition of the building and construction of nine residential dwellings.

2.2 The Soils and Foundations

- 2.2.1 The soil of the site is described at <http://www.landis.org.uk/soilscales> as being 'Slowly permeable seasonally wet slightly acid but base-rich loamy and clayey soils' and having impeded drainage.
- 2.2.2 The following is taken from the NHBC Standards Chapter 4.2 Building near trees: The combination of shrinkable soils and trees, hedgerows or shrubs represents a hazard to structures that requires special consideration. Trees, hedgerows and shrubs take moisture from the ground and, in cohesive soils such as clay, this can cause significant volume changes resulting in ground movement. This has the potential to affect foundations and damage the supported structure. In order to minimise this risk, foundations should be designed to accommodate the movement or be taken to a depth where the likelihood of damaging movement is low.

2.3 The Trees

- 2.3.1 A total of five groups and two individual trees were surveyed and plotted in order to assess their health and dimensions in accordance with the British Standard and the results are clearly detailed within the Appendices of this report.
- 2.3.2 In general the trees of the site were found to be in reasonable condition for their age and species. Any works identified within the data tables should take place regardless of development in line with best practice. The quality rating for the trees on or affecting this site can be summarised as follows:

U – 1 tree (T1)
A – 0 trees/groups
B – 4 groups (G2, G3, G4 & G5)
C – 1 tree (T2)

2.4 Standard of Work

- 2.4.1 Any tree work undertaken should be done in accordance with British Standard 3998:2010 and by competent contractors insured with public liability cover of at least two million pounds.

2.5 Statutory Controls

- 2.5.1 If the trees on site are subject to any Tree Preservation Orders (TPO's) or are encompassed within a Conservation Area then statutory permission from the Local Planning Authority (LPA) will be required before any tree works take place. A recent check on the Local Authorities Interactive Mapping Service revealed that none of the trees surveyed are protected by a TPO and the site is not within a Conservation Area.

2.6 Wildlife

- 2.6.1 All operations should take account of wildlife needs and be planned to take advantage of weather conditions and time of year for minimum damage and disturbance. If any protected species or nesting birds are present or discovered while the works are taking place all work should cease until contact has been made with Natural England for further advice. Natural England can be contacted on 0300 060 3900 or by e-mail to: enquiries@naturalengland.org.uk. Specific consideration should be given to the possible presence of roosting bats, which are protected by the Wildlife and Countryside Act 1981 (schedule 5) and included in schedule 2 of the Conservation Regulations 1994. Ideally, a survey should be carried out to identify any potential roost sites and if bats are found to be present advice should be sought from a person qualified and experienced in handling such matters and fully conversant with the implications of the Act.

3.0 DISCUSSION

- 3.1 The majority of the root system, of a tree, is in the surface 600mm of the soil, extending radically for distances frequently in excess of the trees height. Beyond the main structural roots (close to the base of the trunk), the root system rapidly sub-divides into smaller diameter roots: off this main system, a mass of fine roots develops.
- 3.2 The shape of the main structural roots develops in response to the need for the tree to have physical stability. Beyond these major roots, root growth and development is influenced by the availability of water and nutrients. Unless conditions are uniform around the tree, which would be unusual, the extent of the root system will be very irregular and difficult to predict. It will not generally show the symmetry seen in the branch system.
- 3.3 The parts of the root system, which are active in water and nutrient uptake, are very fine, typically less than 0.5mm diameter. They are short lived, developing in response to the needs of the tree, with the majority dying each winter. It is *essential* that conditions in the soil remain conducive to the healthy growth of these fine roots so that the water and nutrients necessary for healthy tree growth can be absorbed.
- 3.4 All parts of the root system, but especially the fine roots, are vulnerable to damage. Once they are damaged, water and nutrient uptake will be restricted until new roots have regenerated. Vigorous young trees will be capable of rapid regeneration, but over mature trees will respond slowly, *if at all*.

- 3.5 In order to live and grow, roots need oxygen from the soil. Respiration by the roots and other soil organisms depletes this oxygen and increases carbon dioxide levels in the soil; a correct balance of these gases is normally maintained by diffusion between the soil and the atmosphere. Anything, which disturbs this balance, will affect the condition of the root system.
- 3.6 The factors that most commonly affect this diffusion adversely, and therefore damage roots, are the following: -
- a) Compaction of the ground, which reduces the space between soil particles. This is particularly important on clay soils. A single passage by heavy equipment on clay soils or storage of heavy materials can cause significant damage.
 - b) Changing soil levels, even for a few weeks.
 - c) Covering the root area with impervious surfaces.
 - d) A rise in the level of the water table. Roots can tolerate submersion for short periods. But a permanent rise will deplete the soil of oxygen.
- 3.7 Serious damage is often caused during preliminary site works by stripping the topsoil. For this reason, such works should be avoided until protective fencing has been erected.
- 3.8 Excavations in the rooting area can sever roots. As the majority of roots are in the surface 600mm, even shallow excavations can cause damage.
- 3.9 Excavations for foundations, landscaping or service trenches are usually sufficiently deep to sever most of the roots, and it should therefore be assumed that all parts of the root system beyond the excavation would no longer serve the tree.
- 3.10 Excavation or soil stripping which sever or damage the roots may impair the stability of the tree and make it dangerous.

4.0 ARBORICULTURAL IMPLICATIONS ASSESSMENT

- 4.1 The purpose of this section is to assess the implications the proposed development will have on the tree identified in the Tree Survey of 31st October 2023 carried out by DEP (see Appendix B & F) and advise on arboricultural measures, which would be likely to mitigate any damage resulting from the proposals.
- 4.2 The Site Layout Plan within Appendix F identifies the trees in relation to the proposed development.
- 4.3 In order to fully assess the impact of the development an Implications Table has been created, which gives details of the proximity of the associated works to the trees.

- 4.4 The below Implications Table details the Root Protection Area (RPA) in accordance with the British Standard 5837:2012 *Trees in relation to design, demolition and construction – Recommendations*. This is an area that should be left undisturbed in order to provide adequate rooting area for retained trees. This is also illustrated on the Site Plan of Appendix F.
- 4.5 This information can then be used in accordance with BS 5837:2012 to determine whether the development will have a detrimental impact on the health of the trees. Once this has been determined remedial measures can be detailed to reduce the impact the proposals will have.
- 4.6 Implications Table: -

Tree No.	Species	Root Protection Area (m ²)	Circle Radius (m)	Distance to any proposed construction or surfacing (m)	Can the Tree be Successfully Retained
G1	Mixed	<40.72	<3.60	Remove for development	
G2	Silver Birch	<113.10	<6.00	4.0+ & 9.0+	Yes see 5.0
T1	Ash	72.38	4.80	Remove for condition	
T2	Goat Willow	162.86	7.20	Remove for development	
G3	Hybrid Poplar	<113.10	<6.00	n/a	Yes
G4	Silver Birch	<72.38	<4.80	n/a	Yes
G5	Mixed	<72.38	<4.80	n/a	Yes

- 4.7 To assess the implications of the proposed development each tree can be categorised in the following way: -

	Trees to be Retained		Trees to be removed	
	With No Impact	Impact within shown RPA	Due to Condition	Due to Development
Tree No.	G3, G4 & G5	G2	T1	G1 & T2

5.0 MITIGATING PROPOSALS

5.1 Tree Losses and Replacement Planting

- 5.1.1 The loss of any tree is always regrettable although in this instance the trees/scrub to be removed for development are of minor significance. G1 is on the edge of a larger mixed scrub wooded area and some of the trees look to have been planted when the club was in use. The removal of this section and the cutting back of the adjacent wooded area will not have any detrimental impact on the locality. T2 (Willow) is located on a fence line at a different level than the existing building so its retention would be difficult.
- 5.1.2 It is considered that these losses can easily be mitigated for within the new landscape scheme for the site as prepared by DEP, which includes strategic tree, hedge and shrub planting.

5.2 Development

- 5.2.1 As shown above, the Implications Table identifies the potential for the development to have an impact on G2 due to the proximity of the proposed development potentially being within their Root Protection Areas (RPAs).
- 5.2.2 The nearest development to these trees is for the new access road and parking spaces. However, the nearest surfacing to any tree within G2 is 4m, which is a reasonable distance not to cause significant root damage. In addition, the trees that the surfacing is close to are of a smaller stem diameter than the overall recorded 500mm. No special measures other than tree protective fencing is considered necessary.
- 5.2.3 There will be some shading to the rear gardens of these properties and to the living space of five of the units. This is unavoidable in this instance, but the trees concerned are all Silver Birch, which do produce a more dappled shade as opposed to other species such as Sycamore. Many of these trees are swamped in Ivy and if this were managed then this could improve the situation. None of the canopy's overhang any of the houses.
- 5.2.4 A clear tree works specification and details of all tree protective measures can be found in the following Arboricultural Method Statement.

6.0 METHOD STATEMENT

Before any form of development commences on the site the following works should be undertaken: -

6.1 Tree Works

Tree No.	Proposed Works
G1, T1 & T2	Fell to ground level and remove stumps.

Recommended works should be carried out to the *British Standard Recommendations for Tree Work, BS 3998:2010*

6.2 Demolition of Existing Property

6.2.1 Prior to any works the tree protective fencing as mentioned below shall first be placed in the position as shown on the plans of Appendix F for the purpose of protecting the trees during demolition and construction.

6.3 Tree Protective Fencing

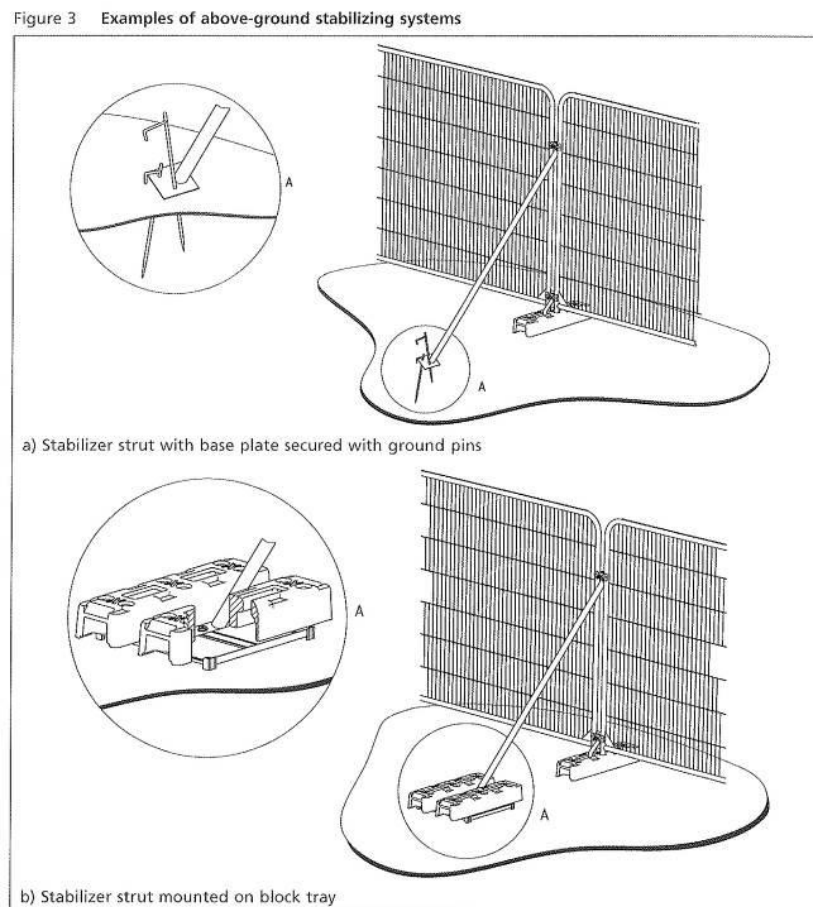
6.3.1 Construction Exclusion Zones (CEZs) shall be enclosed by Temporary Protective Fencing and/or, where necessary, Temporary Ground Protection. All fencing used on the site should fully comply with *BS 5837:2012 Trees in relation to design, demolition and construction – Recommendations*.

6.3.2 The fencing should be strong and suitable for local conditions. It should also take into account the degree of construction activity on the site.

6.3.3 In this circumstance the location for the protective fencing should be as shown on the Tree Protection Plan of Appendix F and of the following specification:

6.3.4 Temporary protective fencing panels shall be weldmesh "Heras" panels of at least 2.0 metres in height. The panels shall stand on rubber or concrete feet and butt together and be joined together using a minimum of two anti-tamper couplers, installed so that they can only be removed from inside the fence. The panels shall be supported on the inner side by stabiliser struts, which shall be clamped to the scaffold framework at a 45° angle and extend back into the CEZ and shall be attached to a block tray base (Figure 3b). No fixing shall be made to any tree and all possible precautions shall be taken to prevent damage to tree roots when locating posts.

Figure 3(a): Type 2 Fencing (BS5837:2012 above-ground strut stabilising system with ground pins)



6.3.5 No storage of materials or any construction operations should occur within the fenced area. Additionally, when designing the site layout, account should be taken of the route/installation method of underground services/drains and, the route/construction method of new access roads/driveways in relation to the retained trees. It would be advisable to mark out the optimum position of the protective fencing on the ground prior to finalisation of any design proposal.

6.3.6 Notices should also be erected on the fencing stating, 'Protected Area - No operations within fenced area'. An example can be found in Appendix E, which should be laminated and attached to the fencing at regular intervals.

6.3.7 The positioning of the protective fencing is also very important and should be erected in the proposed location identified on the site plan of Appendix F. Once the fence has been erected it should never be crossed and particular care should be taken not to store any materials or soil within the protected area.

6.4 Additional Precautions Outside Fenced Areas

6.4.1 Oil, bitumen, cement or other material likely to cause damage to the tree will not be stacked or discharged within 10m of the trees stem or within the protective area. Also, materials in general will not be stacked or discharged within the exclusion zone.

- 6.4.2 Concrete mixing and washing will not be carried out within 10m of any retained trees.
- 6.4.3 Fires will not be lit beneath the foliage or in a position where the flames could extend to within 5m of the foliage, branches or trunk. If the fire is large, then this may necessitate a distance of at least 20m.
- 6.4.4 Trees that are to be retained will not be used as anchorage for equipment.
- 6.4.5 Notice boards, telephone cables, or other services will not be attached to any part of the retained tree.
- 6.4.6 Care should be taken when using cranes or other equipment near the canopy of the retained trees. Also, any trees to be felled in proximity to the retained trees should be done so with particular care.

6.5 Site Buildings

- 6.5.1 Site cabins, compounds and welfare should all be placed outside of the protection areas of retained trees.
- 6.5.2 Where this is not possible further advice should be sought from the appointed arborist and in some circumstances, it may be possible to construct temporary ground protection and adjust fencing, but this is only to be considered as a last resort.
- 6.5.3 On larger sites of more intensive development where there is little open space for site buildings then alternative arrangements off site should be considered or part of the site should remain undeveloped until the final stages when less site storage is needed.

6.6 Services

- 6.6.1 Where possible all service trenches should be dug outside of the Root Protection Area.
- 6.6.2 Should this not be possible then the guidelines within 'NJUG 10' *Guidelines for the Planning, Installation and Maintenance of Utility Services in Proximity to Trees* should be adopted, in particular Section 4.0, which is included within Appendix D of this report.

6.7 Summary of Methodology for the Protection of Trees

- 1. Remedial tree works carried out in accordance with this report and by a competent and fully insured arboricultural contractor and in accordance with BS 3998:2010.**
- 2. Erection of Tree Protective Fencing in accordance with this Method Statement and plan of Appendix F and to be checked by the appointed arboriculturalist before commencement of works.**
- 3. The demolition of the existing building.**
- 4. The construction of the new development.**
- 5. The removal of Protective Fencing is only to be done with the agreement of a competent arborist or the LPA.**
- 6. New landscaping scheme including tree planting.**

6.8 Conclusion

In this instance tree losses and impact on retained trees is minor and can easily be compensated for within a the new landscape scheme provided for the site.

Signed



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APPENDIX A - Glossary of Terms & Table 1 of BS 5837:2012

The following terms are concurrent with best Arboricultural practice and within the guidelines set by the International Society of Arboriculture (ISA), the Arboricultural Association (AA) and the British Standards Institute (BSI).

Dbh: Diameter at Breast Height is measured at 1.5m and recorded in millimetres. Where a tree becomes multi-stemmed below 1.5m the diameter of each stem is measured at 1.5m and added together. Where a tree has low branching or has swelling the stem is measured at the narrowest point below.

Height: Height was estimated and recorded in metres.

Age Range: Age is site specific and categorised:

Young (Y)	Out-planted trees that have not yet established.
Semi-Mature (SM)	Established trees up to 1/3 of expected height and crown.
Early Mature (EM)	Between 1/3 and 2/3 of expected height and crown.
Mature (M)	Between 2/3 and full expected height and crown.
Fully Mature (FM)	Full expected height and crown.
Over Mature (OM)	Crown beginning to break-up and decrease in size.
Senescent (S)	Crown in advanced stage of break-up.

Crown Spread: Measured in metres at four cardinal points (N, E, S & W).

Crown Clearance: Measured in metres from the ground to the first branch tip on development side only.

Condition - Assessment of current physiological condition and structural morphology incorporating vigour and vitality and categorised:

- A - Tree needing little, if any attention
- B - Tree with minor, but rectifiable defects, or in the early stages of physiological stress
- C - Tree with significant structural and physiological flaws and/or extremely stressed
- D - Tree that is dead, biologically/physically moribund or dangerous

Desirability To Retain – As Outlined in Table 1 of BS 5837:2012 Trees in relation to design, demolition and construction – Recommendations (see below).

Definition of Physiological & Morphological Terms

Adaptive Growth - The process whereby wood formation is influenced both in quantity and in quality by the action of gravitational force and mechanical stresses on the cambial zone.

Bifurcation – Forked or divided union.

Brown Rot - Form of decay where cellulose is degraded, while lignin is only modified.

Cankers (target or tumorous) - A localised area of dead bark and cambium on a stem or branch, caused by fungal or bacterial organisms, characterised by woundwood development on the periphery. This may be annual or perennial.

Cavity - An open wound, characterised by the presence of extensive decay and resulting in a hollow.

Chlorotic Leaf - Lacking in chlorophyll, typically yellow in colour.

Compartmentalisation - The physiological process that creates the chemical and mechanical boundaries that act to limit the spread of disease and decay organisms.

Coppicing - Is an ancient form of woodland management that involves repetitive felling on the same stump, near to ground level, and allowing the shoots to re-grow from that main stump. (Also known as the coppice stool).

Crack - Longitudinal spilt in stem or branch, involving bark and/or underlying wood. These may be vertically and horizontally orientated.

Decay - Process of degradation of woody tissues by fungi and bacteria through decomposition of cellulose and lignin.

Deadwood - Deadwood is often present within the crown or on the stems of trees. In some instances it may be an indication of ill health, however, it may also indicate natural growth processes. If a target is present beneath the tree, deadwood may fall and cause injury or damage and should be removed, otherwise deadwood can remain intact for conservation purposes (insects, fungi, birds etc.).

End Weight - The concentration of foliage at the distal ends of stems and deficient in secondary branches.

Girdling Root - Root which circles and constricts the stem or roots causing death of phloem and/or cambial tissue.

Hazard Beam - An upwardly curved branch in which strong internal stresses may occur without the compensatory formation of extra wood (longitudinal splitting may occur in some cases).

Included Bark Union - Pattern of development at branch junctions where bark is turned inward rather than pushed out. Potential weakness due to a lack of a woody union.

Ivy Growth - Ivy growth may ascend into the tree's crown, increasing wind resistance, concealing potential defects and reducing the tree's photosynthetic capacity. Ivy growth is often acceptable in woodland areas as a conservation benefit.

Live Crown Ratio - The relative proportion of photosynthetic mass (leaf area) to overall tree height.

Reaction Wood - Specialised secondary xylem, which develops in response to a lean or similar mechanical stress, attempting to restore the stem to the vertical.

Root Plate Lift - The physical movement of the rooting plate causing soils to shift and crack. May occur during adverse weather conditions. Trees may become unstable.

Structural Defect - Internal or external points of weakness, which reduce the stability of the tree.

Suppressed - Trees which are dominated by surrounding vegetation and whose crown development is restricted from above.

Topping - A highly disfiguring practise, likely to cause severe xylem dysfunction and decay in major structural parts of the wood.

White Rot - Form of decay where both cellulose and lignin are degraded.

Wound - Any injury, which induces a compartmentalisation response.

Woundwood - Wood with atypical anatomical features, formed in the vicinity of a wound and a term to describe the occluding tissues around a wound as opposed to the ambiguous term "callus."

Woodland Structure - The vertical and horizontal arrangement of trees within a group or woodland i.e. Dominant - trees with a crown above the upper layer of the canopy, Co-dominant trees that define the general upper edge of the canopy, Intermediate trees that have been largely overgrown by others, Suppressed trees that have been overgrown and occupy an under storey position and grow slowly, often severely asymmetrical.

Note: The definitions described above, may not necessarily be included within the Arboricultural Survey Data.

Table 1 – Cascade chart for tree quality assessment

Category and definition		Criteria (including subcategories where appropriate)		
Trees unsuitable for retention (see note)				
Category U Those in such a condition that they cannot realistically be retained as living trees in the context of the current land use for longer than 10 years		- Trees that have 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 U category trees (i.e. where, for whatever reason, the loss of companion shelter cannot be mitigated by pruning) - Trees that are dead or are showing signs of significant, immediate, and irreversible overall decline - Trees infected with pathogens of significance to the health and/or safety of other trees nearby (e.g. Dutch elm disease), or very low quality trees suppressing adjacent trees of better quality Note – Category U trees can have existing or potential conservation value which it might be desirable to preserve; see 4.5.7.		
	1 Mainly arboriculture qualities	2 Mainly landscape qualities	3 Mainly cultural values, including conservation	
Trees to be considered for retention				
Category A Trees of high quality with an estimated remaining life expectancy of at least 40 years	Trees that are particularly good examples of their species, especially if rare or unusual, or those that are essential components of groups or formal or semi-formal arboriculture 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 years	Trees that might be included in category A, but are downgraded because of impaired condition (e.g. presence of significant though remediable defects, including unsympathetic past management and minor storm damage), such 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	Trees present in numbers, usually as groups or woodlands, such that they attract a higher collective rating than they might as individuals; or trees occurring as collectives but situated so as to make little visual contribution to the wider locality	Trees with material conservation or other cultural value	
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 150 mm	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	Tree with no material conservation or other cultural value	

APPENDIX B – Arboricultural Data

Arboricultural Data Sheet: Dales Country Club, Okell Drive, Halewood, Liverpool, L26 7XB **Date of Survey:** 31/10/23 **Weather:** Inclement **Surveyor:** PM

Crown C = Crown Clearance; Cond R = Condition Rating; ERC (Yrs) = Estimated Remaining Contribution; TQRA = Tree Quality Category Rating; RPA (m²) = Root Protection Area (m²)

Recommended works should be carried out to the *British Standard Recommendations for Tree Work, BS 3998:2010*

Tree No.	Species	Dbh (mm)	Height (m)	Age	Crown Spread				Crown C	Cond R	Observations and Comments	Preliminary Recommendations	ERC (Yrs)	TQC R	RPA (m²)	RPA Circle Radius (m)
					N	E	S	W								
G1	Group - Hawthorn, Goat Willow, Lawson Cypress & Damson	<300	<10	Y-EM	3	3	3	3	0	B	Woodland edge scrub, several Conifer trees have been planted, hard to tell where the boundary is due to overgrowth.	n/a	10+	C2	<40.7 2	<3.60
G2	Group - Silver Birch	<500	<17	EM-M	6	6	6	6	3	B	A linear close group located within the adjacent nature trail. Several trees with Ivy on stems. Minor wounds on several trees. Several stems do overhang the site quite a bit. Overall good form and vigour.	n/a	20+	B2	<113. 10	<6.00
T1	Ash	400	14	EM	4	6	5	0	2	C	A self-sown scrub specimen close to the building in the early stages of Ash Dieback.	n/a	5-10	U	72.38	4.80
T2	Goat Willow	600	10	EM	5	5	5	4	2	B	A scrub multi-stemmed specimen swamped in Ivy. No view of base. Close to building.	n/a	10+	C2	162.8 6	7.20
G3	Hybrid Poplar	<500	<20	EM	7	7	7	7	4	B	A linear vigorous close group located within the adjacent nature trail. Several trees with Ivy on stems. Minor wounds on several trees. Several stems do overhang the site quite a bit with high crowns. Overall good vigour.	n/a	20+	B2	<113. 10	<6.00
G4	Group - Silver Birch	<400	<14	SM-EM	5	5	5	5	3	B	A linear close group located within the adjacent nature trail. Several trees with Ivy on stems. Minor wounds on several trees. Overall good vigour.	n/a	20+	B2	<72.3 8	<4.80
G5	Group - Goat Willow, Poplar, Oak, Silver Birch & Damson	<400	<12	Y-EM	4	4	4	4	1.5	B	A Sporadic group of adventitious scrub. Rapidly becoming populated by sapling Poplar from the adjacent trees. The oldest trees present are mostly likely the Oak and Willow marked on the plan.	n/a	20+	B2	<72.3 8	<4.80



G3



G2



G2



G2



G2



T1



T2



T2

T1



Edge of G5



G5



G5



G1



APPENDIX C – Key References

1. *British Standard BS 5837: (2012) Trees in relation to design, demolition and construction - Recommendations. ISBN 978-0-580-69917-7*
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APPENDIX D

NJUG 10 Section 4.0

NJUG Guidelines for the Planning, Installation and Maintenance of Utility Apparatus in Proximity to Trees

Telecommunications Code (Schedule 2). Paragraph 19 of the Telecommunications Code enables operators to require the lopping of trees which overhang the street and obstruct or interfere with the working of their lines.

4. HOW TO AVOID DAMAGE TO TREES

This section gives general guidance on methods of work to minimise damage to trees. The local authority (or for privately owned trees, the owner or their agent), should be consulted at an early stage prior to the commencement of any works. This will reduce the potential for future conflict between trees and apparatus.

4.1 Below Ground

Wherever trees are present, precautions should be taken to minimise damage to their root systems. As the shape of the root system is unpredictable, there should be control and supervision of any works, particularly if this involves excavating through the surface 600mm, where the majority of roots develop.

4.1.1 Fine Roots

Fine roots are vulnerable to desiccation once they are exposed to the air. Larger roots have a bark layer which provides some protection against desiccation and temperature change. The greatest risk to these roots occurs when there are rapid fluctuations in air temperature around them e.g. frost and extremes of heat. It is therefore important to protect exposed roots where a trench is to be left open overnight where there is a risk of frost. In winter, before leaving the site at the end of the day, the exposed roots should be wrapped with dry sacking. This sacking must be removed before the trench is backfilled.

4.1.2 Precautions

The precautions referred to in this section are applicable to any excavations or other works occurring within the Prohibited or Precautionary Zones as illustrated in Figure 1 – ‘Tree Protection Zone’.

4.1.3 Realignment

Whenever possible apparatus should always be diverted or re-aligned outside the Prohibited or Precautionary Zones. Under no circumstances can machinery be used to excavate open trenches within the Prohibited Zone.

NJUG Guidelines for the Planning, Installation and Maintenance of Utility Apparatus in Proximity to Trees

The appropriate method of working within the Precautionary Zone should be determined in consultation with the local authority (or for privately owned trees the owner or their agent) and may depend on the following circumstances;

- the scope of the works (e.g. one-off repair or part of an extensive operation)
- degree of urgency (e.g. for restoration of supplies)
- knowledge of location of other apparatus
- soil conditions
- age, condition, quality and life expectancy of the tree

Where works are required for the laying or maintenance of any apparatus within the Prohibited or Precautionary Zones there are various techniques available to minimise damage.

Acceptable techniques in order of preference are;

a) Trenchless

Wherever possible trenchless techniques should be used. The launch and reception pits should be located outside the Prohibited or Precautionary Zones. In order to avoid damage to roots by percussive boring techniques it is recommended that the depth of run should be below 600mm. Techniques involving external lubrication of the equipment with materials other than water (e.g. oil, bentonite, etc.) must not be used when working within the Prohibited Zone. Lubricating materials other than water may be used within the Precautionary Zone following consultation and by agreement.

b) Broken Trench - Hand-dug

This technique combines hand dug trench sections with trenchless techniques if excavation is unavoidable. Excavation should be limited to where there is clear access around and below the roots. The trench is excavated by hand with precautions taken as for continuous trenching as in (c) below. Open sections of the trench should only be long enough to allow access for linking to the next section. The length of sections will be determined by local conditions, especially soil texture and cohesiveness, as well as the practical needs for access. In all cases the open sections should be kept as short as possible and outside of the Prohibited Zone.

NJUG Guidelines for the Planning, Installation and Maintenance of Utility Apparatus in Proximity to Trees

c) Continuous Trench - Hand-dug

The use of this method must be considered only as a last resort if works are to be undertaken by agreement within the Prohibited Zone. The objective being to retain as many undamaged roots as possible.

Hand digging within the Prohibited or Precautionary zones must be undertaken with great care requiring closer supervision than normal operations.

After careful removal of the hard surface material digging must proceed with hand tools. Clumps of roots less than 25mm in diameter (including fibrous roots) should be retained in situ without damage. Throughout the excavation works great care should be taken to protect the bark around the roots.

All roots greater than 25mm diameter should be preserved and worked around. These roots must not be severed without first consulting the owner of the tree or the local authority tree officer / arboriculturist. If after consultation severance is unavoidable, roots must be cut back using a sharp tool to leave the smallest wound.

4.1.5 Backfilling

- Any reinstatement of street works in the United Kingdom must comply with the relevant national legislation (see: **Volume 6 – ‘Legislation and Bibliography’**). In England this relates to the requirements of the code of practice – ‘Specification for the Reinstatement of Openings in Highways’ approved under the New Roads and Street Works Act 1991. Without prejudice to the requirements relating to the specification of materials and the standards of workmanship, backfilling should be carefully carried out to avoid direct damage to roots and excessive compaction of the soil around them.
- The backfill should, where possible, include the placement of an inert granular material mixed with top soil or sharp sand (not builder’s sand) around the roots. This should allow the soil to be compacted for resurfacing without damage to the roots securing a local aerated zone enabling the root to survive in the longer term.
- Backfilling outside the constructed highway limits should be carried out using the excavated soil. This should not be compacted but lightly “tamped” and usually left slightly proud of the surrounding surface to allow natural settlement. Other materials should not be incorporated into the backfill.

NJUG Guidelines for the Planning, Installation and Maintenance of Utility Apparatus in Proximity to Trees

4.1.6 Additional Precautions near Trees

- Movement of heavy mechanical plant (excavators etc.) must not be undertaken within the Prohibited Zone and should be avoided within the Precautionary Zone, except on existing hard surfaces, in order to prevent unnecessary compaction of the soil. This is particularly important on soils with a high proportion of clay. Spoil or material must not be stored within the Prohibited Zone and should be avoided within the Precautionary Zone.
- Where it is absolutely necessary to use mechanical plant within the Precautionary Zone care should be taken to avoid impact damage to the trunk and branches. A tree must not be used as an end-stop for paving slabs or other materials nor for security chaining of mechanical plant. If the trunk or branches of a tree are damaged in any way advice should be sought from the local authority tree officer / arboriculturist.

See TABLE 1 –‘Prevention of Damage to Trees Below Ground’ below for summary details regarding causes and types of damage to trees and the implications of the damage and the necessary precautions to be taken to avoid damage.

APPENDIX E

Site Notice For Protective Fencing



TREE PROTECTION AREA KEEP OUT!

TREES ENCLOSED BY THIS FENCE ARE PROTECTED BY PLANNING CONDITIONS AND ARE SUBJECTS OF A
TREE PRESERVATION ORDER
(TOWN & COUNTRY PLANNING ACT 1990)

CONTRAVENTION OF TREE PRESERVATION ORDER MAY LEAD TO CRIMINAL PROSECUTION

THE FOLLOWING **MUST BE OBSERVED BY ALL PERSONS:-**

- THE PROTECTIVE FENCING MUST NOT BE REMOVED
- NO PERSON SHALL ENTER THE PROTECTED AREA
- NO MACHINE OR PLANT SHALL ENTER THE PROTECTED AREA
- NO MATERIALS SHALL BE STORED IN THE PROTECTED AREA
- NO SPOIL SHALL BE DEPOSITED IN THE PROTECTED AREA
- NO EXCAVATION SHALL OCCUR IN THE PROTECTED AREA

**ANY INCURSION INTO THE PROTECTED AREA MUST BE
WITH THE WRITTEN PERMISSION OF THE LOCAL PLANNING AUTHORITY**

APPENDIX F – Site Plans

Trees Constraints Plan

Development Layout Plan

Tree Protection Plan



KEY

TREE SURVEY

T1

Retention Category A trees and groups of high quality

T1

Retention Category B trees and groups of moderate quality

T1

Retention Category C trees and groups of low quality

T1

Category U trees and groups of poor quality

Root Protection Areas: Calculated inline with BS5837:2012 to show a circular RPA which does not take into consideration site conditions



dep

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Client

MID Developments

Project

Okell Drive, Halewood

Description

Tree Constraints Plan

Status

PLANNING

Scale

1/1000@A3

Drawn

PM

Job number

5326

Drawing number

01

Date

02.10.23

Revision

x

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KEY

TREE SURVEY

- Retention Category A trees and groups of high quality
- Retention Category B trees and groups of moderate quality
- Retention Category C trees and groups of low quality
- Category U trees and groups of poor quality
- Root Protection Areas: Calculated in line with BS5837:2012 to show a circular RPA which does not take into consideration site conditions



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Client
MID Developments
Project
Okell Drive, Halewood

Description
Development Layout Plan

Status
PLANNING

Scale	1/500@A3	Drawn	PM
Job number	5326	Drawing number	02
Date	02.10.23	Revision	x

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KEY

TREE SURVEY

T1

Retention Category A trees and groups of high quality

T1

Retention Category B trees and groups of moderate quality

T1

Retention Category C trees and groups of low quality

T1

Category U trees and groups of poor quality

Root Protection Areas: Calculated inline with BS5837:2012 to show a circular RPA which does not take into consideration site conditions

Tree Protection Fencing

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Client
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Project
Okell Drive, Halewood

Description
Tree Protection Plan

Status
PLANNING

Scale	1/500@A3	Drawn	PM
Job number	5326	Drawing number	03
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