

**Arboricultural Survey to BS5837:2012**

**Mr M & Mrs T Shearwood**

**The Old Mill, Knights Mill,  
St Teath,  
Bodmin  
PL30 3JE**

**05 July 2023**

**Jon Hartley BSc(Hons) MArborA**

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## 1. Introduction

Arbtech Consulting Limited (Arbtech) received written instruction on 16 May 2023 from Michael Shearwood to attend The Old Mill, Knights Mill, St Teath, Bodmin PL30 3JE; grid reference, SX 07102 80636 (site) to undertake an arboricultural survey a to BS5837:2012 guidance to assess trees, hedges and major shrub groups growing on and within influencing distance of the site and to produce a Schedule of trees and Tree Constraints Plan.

I am Jon Hartley, an arboricultural surveyor at Arbtech Consulting Ltd. I undertook the tree survey on 06 June 2023 and subsequently, have produced this summary of my findings.

I passed the RFS Certificate of Arboriculture in 2000 after a short time working in the industry. During a six-year spell in Australia, I passed the Australian Qualifications Framework (AQF) level 5 Diploma in arboriculture. I also now hold a BSc (Hons) degree in Arboriculture and Urban Forestry and the obligatory LANTRA Professional Tree Inspector certification. I benefit from professional industry experience spanning 20 years. I have professional memberships with the Consulting Arborist Society and the Arboricultural Association and an associate membership with the Institute of Chartered Foresters.

The advice below and appended is underwritten by our Professional Indemnity insurance for the business practice of Arboricultural Consultancy in the sum of one million Pounds Sterling in each and every claim.

**Table 1:** Documents referred to.

Document	Reference No.
Survey base drawing	SUMO-10875_01
LPA pre-app comments	N/A
British Standard 5837:2012	“BS5837”
Tree Survey Schedule	Arbtech TS 01
Tree Constraints Plan	Arbtech TCP 01

## 2. Survey

Survey: An arboricultural survey to BS5837 of all trees within impacting distance of the site was undertaken by Jon Hartley on 06 June 2023.

During the survey I categorised the trees using “Table 1 –Cascade chart for tree quality assessment” of the BS5837:2012 (see Appendix 1).

A total of 7No. individual trees and 4No. groups of trees groups were surveyed. Details for each of the trees surveyed are provided in the Schedule of Trees (see Appendix 2).

Multiple small trees and shrubs occupy the site, none of which meet the minimum diameter requirements to be considered for this survey. The survey effort for the site was limited to the development area as indicated by the survey boundary at Figure 2.

**Table 2:** Documents upon which this tree survey has been based.

Document	Originator	Reference Number	Title
Survey base drawing	Sumo Survey Services	SUMO-10875_01	Topographical Survey

Limitations: The survey was made at ground level using visual observation only. Detailed examinations, such as climbing inspections and advanced decay detection equipment were not employed, though may form part of the survey’s management recommendations. Measurements were taken using specialist tapes, laser, and GPS devices. Where this was not possible, measurements are estimated.

Scope: Pre-development tree surveys make arboricultural management recommendations based exclusively upon the individual tree or group of trees condition relative to their present context (*i.e. not in relation to the proposed development*).

Legal Status: No statutory protection check has been performed. BS5837 does not draw any distinction between trees subject to statutory protection, such as a Tree Preservation Order (“TPO”), and those trees without. This is principally because a detailed planning consent overrides any TPO protection. Consequently, we do not seek to offer any comparison between or infer any difference in the quality or importance of TPO trees and other trees.

\* For more information on the surveyed trees please see Arbtech Consulting Ltd, Tree Survey Schedule (Appendix 1), Tree Survey Report and Tree Constraints Plan.

## Site description

One converted Mill and two small cottages occupying a 5 acre plot with the properties being close to the road and the plot being bounded by the river Alan on one side and a leet on the other. Part of the gardens (away from the cottages) falls within an SSSI of the Camel estuary.



Figure 1: OS Map showing site location (Bing Maps)



Figure 2: Aerial Image of site with approximate red line boundary showing survey area (Google Earth)

## Proposed scheme

To build an extension which will join the Mill house to the converted stables to form one larger property. The building will occupy an area which is currently tarmacked. No trees will be removed and the existing drainage will be utilised

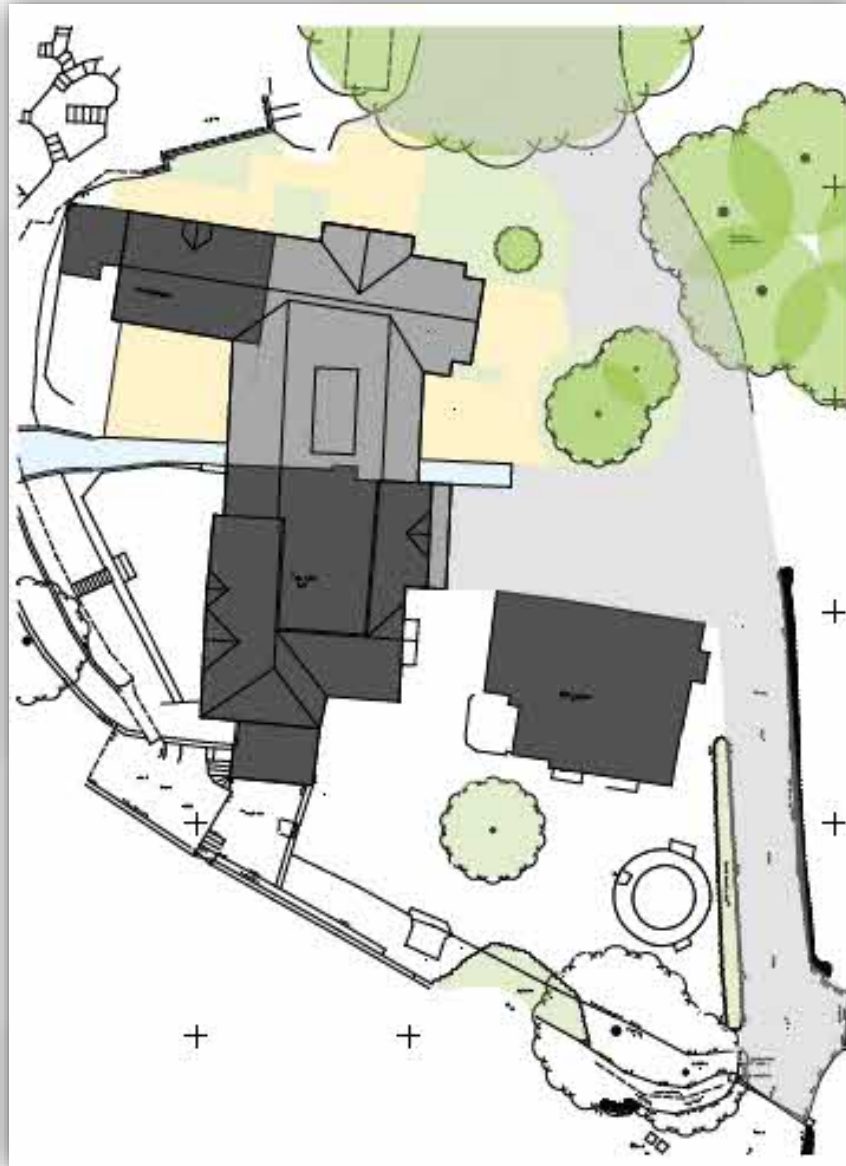


Figure 3: Proposed Site Plan, Drawing No. 22.425 S02.05 (Swain Architecture).



**Figure 4:** Proposed Site Plan, Drawing No. 22.425 S02.05 (Swain Architecture) with Tree Constraints Plan, Drawing No. Arbtech TCP 01 (Arbtech) overlaid showing no RPA incursions.

It is likely that proposed development can be installed successfully with suitable arboricultural methodology and tree projection.

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### 3. BS5837:2012 Scope

This standard recognises that there can be problems for development close to existing trees which are to be retained, and of planting trees close to existing structures. This standard sets out to assist those concerned with trees, in relation to construction, to form balanced judgements. It does not set out to put arguments for or against development, or for the removal or retention of trees. Where development, including demolition, is to occur, the standard provides guidance on how to decide which trees are appropriate for retention, on the means of protecting these trees during development, including demolition and construction work, and on the means of incorporating trees into the developed landscape.

### 4. Methodology

The methodology used to assess the trees was the British Standard 5837:2012 ‘Trees in Relation to Construction’ tree survey method. The aim of the survey is to establish which trees are moderate and good quality; suitable for retention and justifying protection. And which trees are low or poor quality; either undesirable or unsuitable to retain and protect.

The tree survey includes all trees included in the land survey red line boundary plan, as well as any that may have been missed, and it should categorize trees or groups of trees, including woodlands for their quality and value within the existing context, in a transparent, understandable, and systematic way. Where the arboriculturist has deemed it appropriate, the trees have been tagged with small metal or plastic tags, placed as high as is convenient on the stem of each tree.

Whilst master plan proposals for the development of the site might be available, the trees have been surveyed without taking these into consideration. All detailed design work on site layout should take into consideration the results of the tree survey (and the TCP).

Trees forming groups and areas of woodland (including orchards, wood pasture and historic parkland) are identified and considered as groups where the arboriculturist has determined that this is appropriate, particularly where they contain a variety of species and age classes that could aid long-term management. It is often expedient to assess the quality and value of such groups of trees as a whole, rather than as individuals. However, an assessment of individuals within any group has been undertaken if they are open-grown or if there is a need to differentiate between them.

The quality and value of each tree or group of trees has been recorded by allocating it to one of the four categories: **A**, **B**, **C**, or **U** (highest to lowest quality respectively). The categories are differentiated on the tree survey plan by colour, or by suffixing the category adjacent to the tree identification number on the TCP.



The survey schedule lists all the trees or groups of trees. The following information is also provided:

- a) reference number (to be recorded on the tree survey plan);
- b) species (common or scientific names);
- c) height in meters (m);
- d) stem diameter in millimetres (mm) at 1.5m above adjacent ground level or immediately above the root flare for multi-stemmed trees;
- e) branch spread in meters taken at the four cardinal compass points;
- f) height of crown clearance above adjacent ground level in meters (m);
- g) age class (newly planted, young, semi-mature, early mature, mature, over mature);
- h) physiological condition (e.g. good, fair, poor, decline and dead);
- i) structural condition (e.g. good, fair, poor or not visible);
- j) comment about the tree, its location and preliminary management recommendations, including further investigation of suspected defects that require more detailed assessment and potential for wildlife habitat;
- k) The retention category referring to the quality and useful contribution in years; **U** = <10yrs; **A** = >40yrs; **B** = >20yrs; **C** = >10yrs. The retention subcategory referring to the type of amenity; 1 = Arboricultural; 2 = Landscape; 3 = Cultural including conservation (see Appendix 1 Cascade chart for tree quality assessment).

## 5. Definitions

### Arboriculturist

An arboriculturist (or arboricultural consultant) is a person who has, through relevant education, training, and experience, gained recognized qualifications and expertise in the field of trees in relation to construction.

### Tree Survey

A tree survey should be undertaken by an arboriculturist and should record information about the trees on a site independently of and prior to any specific design for development. As a subsequent task, and with reference to a design or potential design, the results of the survey should be included in the preparation of a tree constraints plan, which should be used to assist with site layout design.

### Tree Constraints Plan

A TCP is plan, typically delivered as an AutoCAD drawing (.DWG file format), prepared by an arboriculturist for the purposes of layout design showing the root protection area and representing the effect that the mature height and spread of retained trees will have on layouts through shade, dominance, etc.

### Root Protection Area

An RPA is a layout design tool indicating the area surrounding a tree that contains sufficient rooting volume to ensure the survival of the tree, shown in plan form in m<sup>2</sup>.

### Construction Exclusion Zone (also termed Tree Protection Zone)

A construction exclusion or tree protection zone is an area based on the RPA (in m<sup>2</sup>), identified by an arboriculturist, to be protected during development, including demolition and construction work, by the use of barriers and/or ground protection fit for purpose to ensure the successful long-term retention of a tree.

### Arboricultural Impact Assessment (AIA)

This is 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.

### Tree Protection Plan (TPP)

A TPP is plan, typically delivered as an AutoCAD drawing (.DWG file format), prepared by an arboriculturist showing the finalized layout proposals, tree retention and tree and landscape protection measures detailed within the arboricultural method statement, which can be shown graphically.

### Arboricultural Method Statement (AMS)

This is a methodology for the implementation of any aspect of development that has the potential to result in loss of or damage to a tree. The AMS is likely to include details of an on-site tree protection monitoring regime.

## 6. Limitations

Trees were inspected from using visual observation from ground level only. Trees were not climbed or inspected below ground level. Inaccessible trees will have best estimates made about the location, physical dimensions, and characteristics. Trees have been grouped where BS5837 guides us that it is expedient to do so. Trees have been excluded from the survey if they are found by us to be sufficiently far away from the proposed developable area or if they are outside of the red line boundary plan showing the expectations of our client for the extent of the survey. BS5837 does not draw any distinction between trees subject to statutory protection, such as a Tree Preservation Order (“TPO”), and those trees without. This is principally because a detailed planning consent overrides any TPO protection. Consequently, we do not seek to offer any comparison between or infer any difference in the quality or importance of TPO trees and other trees.

## 7. Appendices

The following documents were released to the Client as appendices to this report:

- Survey Schedule (.PDF)
- Tree Constraints Plan drawing (.DWG & .PDF)

If you require clarification of information contained herein, please do not hesitate to contact us via 01244 661170.

Yours Sincerely,

  
Jon Hartley BSc (Hons) MArborA  
Principal Arboriculturist

07860951396  
jh@arbtech.co.uk

## Appendix 1: Table 1 Cascade chart for tree quality assessment

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## BS5837:2012 Trees in relation to design, demolition and construction –Recommendations

Table 1 Cascade chart for tree quality assessment

Category and definition	Criteria (Including subcategories when appropriate)	Identification on plan
Trees unsuitable for retention (see Note)		
<p><b>Category U</b></p> <p>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.</p>	<ul style="list-style-type: none"> <li>•Trees that have serious, irremediable, structural defect, such that their early loss is expected due to collapse, including those that will become unviable after removal of other category U trees (e.g. where, for whatever reason, the loss of companion shelter cannot be mitigated by pruning).</li> <li>•Trees that are dead or are showing signs of significant, immediate, and irreversible overall decline.</li> <li>•Trees infected with pathogens of significance to the health and/or safety of other trees nearby, or very low quality trees suppressing adjacent trees of better quality.</li> </ul> <p><i>NOTE Category U trees can have existing or potential conservation value which might be desirable to preserve; see 4.5.7.</i></p>	Dark red
	<p><b>1 Mainly arboricultural qualities</b></p>	<p><b>2 Mainly landscape qualities</b></p>
		<p><b>3 Mainly cultural values, including conservation</b></p>
<b>Trees to be considered for retention</b>		
<p><b>Category A</b></p> <p><b>Trees of high quality</b> with an estimated remaining life expectancy of at least 40 years.</p>	<p>Trees that are particularly good examples of their species, especially if rare or unusual; or those that are essential components of groups or formal or semi-formal arboricultural features (e.g. the dominate and/or principal trees within an avenue).</p>	Light green
<p><b>Category B</b></p> <p><b>Trees of moderate quality</b> with an estimated remaining life expectancy of at least 20 years.</p>	<p>Trees that might be included in category A, but are downgraded because of impaired condition (e.g. presence of significant though remedial defects, including unsympathetic management and storm damage), such that they are unlikely to be suitable for retention of beyond 40 years; or trees lacking the special quality necessary to merit the category 'A' designation.</p>	Mid blue
<p><b>Category C</b></p> <p><b>Trees of low quality</b> with an estimated remaining expectancy of at least 10 years, or young trees with a diameter below 150mm.</p>	<p>Unremarkable trees of very limited merit or such impaired condition that they do not qualify in higher categories.</p>	Grey
	<p>Trees, groups, or woodlands of particular visual importance as arboricultural and/or landscape features.</p>	<p>Trees, groups or woodlands of significant conservation, historical, commemorative or other value (e.g. veteran trees or wood-pasture).</p>
	<p>Trees present in numbers, usually growing as groups or woodlands, such that they attract a higher collective rating than they might as individuals; or trees occurring as collectives but situated so as to make little visual contribution to the wider locality.</p>	<p>Trees with material conservation or other cultural value.</p>
	<p>Trees present in groups or woodlands, without this conferring on them significantly greater collective landscape value; an trees offering low or only temporary/transient landscape value.</p>	<p>Trees with no material conservation other cultural value.</p>

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## Appendix 2: Schedule of Trees

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BS5837:2012 Tree Survey

Arbtech Consulting Ltd.

Client: Mr M & Mrs T Shearwood  
 Project: The Old Mill  
 Survey Date: 06/06/2023  
 Surveyor: Jon Hartley



Unit 3, Well House Barns  
 Chester Road  
 Chester  
 Cheshire  
 CH4 0DH  
 Phone: 01244661170

Tree and Tag No Species	Hght (m)	Stems		Crown		Age	RP A (m <sup>2</sup> ) R (m)	Phys Condition	Structural Condition	Preliminary Recommendations Survey Comment	Cat ERC
		No	Ø (mm)	Spread (m)	Clear (m)						
<b>G01</b>										Estimated Measurements	
Various <i>See comments for details</i>	6	1	200	N E S W	3 3 3 3	2 2 2 2	EM A: 18.1 R: 2.4	Good	C: Fair S: Fair B: Fair	Dimensions recorded are the largest represented within the group; mixed species linear group on N side of stream; species include sycamore, hazel, alder, Monterey cypress, holly and ash.	B.2 20+ yrs
<b>G02</b>										Estimated Measurements	
A Group <i>See comments for details</i>	23	1	660	N E S W	3.5 3.5 3.5 3.5	7 7 7 7	EM A: 197.1 R: 7.92	Fair	C: Fair S: Good B: Good	Dimensions recorded are the largest represented within the group; group of ten individual Spruce sp.; crown lifted to current dimensions.	B.2 20+ yrs
<b>G03</b>										Estimated Measurements	
Various <i>See comments for details</i>	5	1	150	N E S W	2 2 2 2	2.5 2.5 2.5 2.5	SM A: 10.2 R: 1.8		C: Good S: Good B: Good	Linear boundary group forming the hedgerow; species include hazel and sycamore with an understory of bamboo.	C.2 20+ yrs
<b>G04</b>										Estimated Measurements	
Various <i>See comments for details</i>	5	1	150	N E S W	2.5 2.5 2.5 2.5	3 3 3 3	SM A: 10.2 R: 1.8	Good	C: Good S: Good B: Good	Linear group including holly, hazel, hawthorn and sycamore.	C.2 20+ yrs

<b>Age Classifications:</b>	N	Newly planted	EM	Early Mature	<b>Condition:</b>	C	Crown	<b>Stems:</b>	Ø	Diameter
	Y	Young	M	Mature		S	Stem		(Eq)	Equivalent stem diameter using BS5837:2012 definition
	SM	Semi-mature	OM	Over Mature		B	Basal area	<b>ERC:</b>		Estimated Remaining Contributio

Tree and Tag No Species	Hght (m)	Stems		Crown		Age	RP A (m <sup>2</sup> ) R (m)	Phys Condition	Structural Condition	Preliminary Recommendations Survey Comment	Cat ERC	
		No	Ø (mm)	Spread (m)	Clear (m)							
<b>T01</b>												
Monterey Cypress <i>Cupressus macrocarpa</i>	27	1	1320	N	8	7.5	M	A: 707 R: 15	Fair	C: Fair S: Fair B: Fair	Two codominant stems from 6m with included bark from 5m; naturally occurring deadwood throughout crown; truncated primary limbs from storm damage predominantly, but not exclusively, in lower SE aspect; stem fluting; historic crown lifting operations with removal of primary branches up to 200mm diameter 90% occlusion; girdling roots on N side; hard surface present on N & E side within 0.5m of base.	C.1.2 10+ yrs
<b>T02</b>											Estimated Measurements	
Sycamore <i>Acer pseudoplatanus</i>	2.5	3	235 (Eq)	N	0.5	2	SM	A: 24.9 R: 2.81	Fair	C: Fair S: Good B: Good	Three codominant stems from base; topped to current dimensions.	C.1 10+ yrs
<b>T03</b>											Estimated Measurements	
Spruce <i>Picea sp.</i>	24	1	660	N	4	4	EM	A: 197.1 R: 7.92	Fair	C: Fair S: Fair B: Poor	Open cavity at base on W side at base; brown rot; internal dysfunction extends to beyond 2m.	U <10 yrs
<b>T04</b>											Estimated Measurements	
Camelia <i>Camelia sp.</i>	3.5	3	136 (Eq)	N	0.5	1	SM	A: 8.4 R: 1.63	Good	C: Good S: Good B: Good	Grows from formal planting bed; pruned to current dimensions.	C.1 20+ yrs
<b>T05</b>											Estimated Measurements	
Rhododendron <i>Rhododendron sp.</i>	3.5	5	139 (Eq)	N	1.5	1	SM	A: 8.7 R: 1.66	Good	C: Good S: Good B: Good	Grows from formal planting bed; pruned to current dimensions.	C.1 20+ yrs
<b>Age Classifications:</b>	N	Newly planted	EM	Early Mature	<b>Condition:</b>	C	Crown	<b>Stems:</b>	Ø	Diameter		
	Y	Young	M	Mature		S	Stem		(Eq)	Equivalent stem diameter using BS5837:2012 definition		
	SM	Semi-mature	OM	Over Mature		B	Basal area	<b>ERC:</b>		Estimated Remaining Contributio		

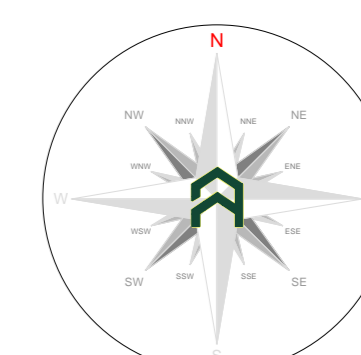


Tree and Tag No Species	Hght (m)	Stems		Crown		Age	RP A (m <sup>2</sup> ) R (m)	Phys Condition	Structural Condition	Preliminary Recommendations Survey Comment	Cat ERC
		No	Ø (mm)	Spread (m)	Clear (m)						
<b>T06</b>											
Sycamore <i>Acer pseudoplatanus</i>	16	1	460	N	2.5	7	EM	A: 95.7 R: 5.51	Good	C: Good S: Good B: Good	Crown lifted to current dimensions; pruning wounds up to 100mm diameter, many of which are fully occluded  40+ yrs
<b>T07</b>											
Common Oak <i>Quercus robur</i>	18	1	750	N	8	6	M	A: 254.5 R: 9	Good	C: Good S: Good B: Good	No significant features noted.  40+ yrs

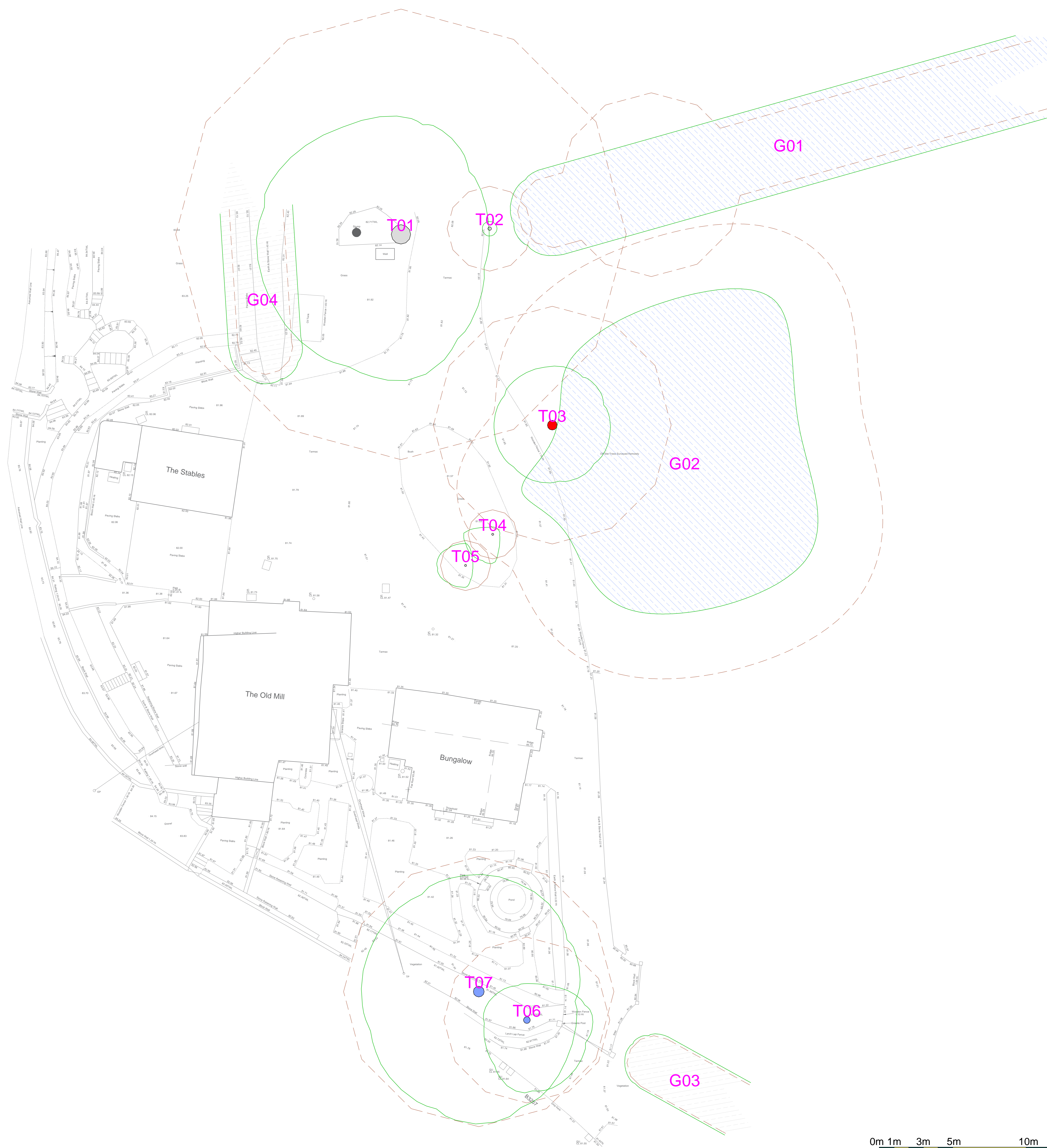
<b>Age Classifications:</b>	N	Newly planted	EM	Early Mature	<b>Condition:</b>	C	Crown	<b>Stems:</b>	Ø	Diameter
	Y	Young	M	Mature		S	Stem		(Eq)	Equivalent stem diameter using BS5837:2012 definition
	SM	Semi-mature	OM	Over Mature		B	Basal area	<b>ERC:</b>		Estimated Remaining Contributio

## Appendix 3: Tree Constraints Plan

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Indicative only



**Tree Categories**

Trees are categorised in accordance with the circulatory chart in Table 1 of the British Standard BS 5837:2012 'Trees in relation to design, demolition and construction - Recommendations'

Category 'U' - Trees in such condition that they cannot realistically be retained as living trees in contrast of the current land use for longer than 10 years.

Category 'C' - Trees of high quality with an estimated remaining life expectancy of at least 40 years.

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

Category 'A' - Trees of low quality with an estimated remaining life expectancy of at least 10 years, or young trees with a stem diameter below 150mm.

**Root Protection Area**

In order to avoid damage to the roots or rooting environment of retained trees, the Root Protection Areas (RPAs) should be plotted around each of the category A, B and C trees. This is a minimum area in m<sup>2</sup> which should be left undisturbed around each retained tree.

The RPA is calculated using the British Standard BS 5837:2012 'Trees in relation to design, demolition and construction - Recommendations'

The calculated RPA is capped to 707m<sup>2</sup>, which is the equivalent to a circle with a radius of 15m. Where there appears to be restrictions to root growth the root protection area is reshaped to more accurately reflect the likely distribution of the roots.

**Tree Survey Report**

Please refer to Arbttech Consulting Ltd Tree Survey Report and Tree Schedule for full details on all surveyed trees, hedgerows and major shrub groups.

All trees were surveyed and categorised in accordance with the guidance as set out in the British Standard BS5837:2012 Tree in relation to design, demolition and construction.

Recommendations:

We make the following recommendation to ensure that no conditions relating to arboriculture are attached to any planning consent secured - obtain arboricultural report to include:

- a) An arboricultural impact assessment (AAI);
- b) An arboricultural method statement (AMS); and
- c) A tree protection plan (TPP)

Rev	Date	Notes



**Project:**  
The Old Mill, Knights Mill, St Teath, Bodmin, PL30 3JE

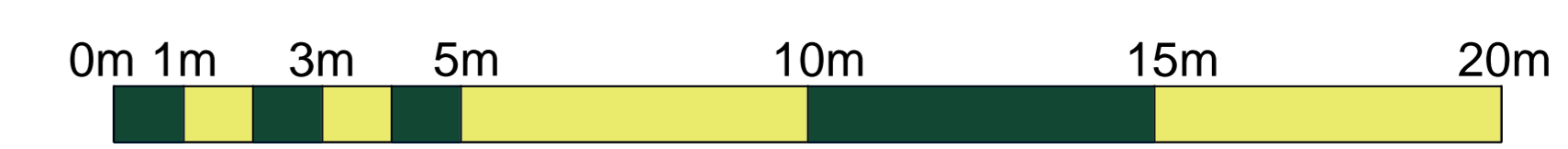
**Client:**  
Mr M & Mrs T Shearwood

**Drawing:**  
Tree Constraints Plan

**Based on:**  
SUMO-10875\_01

**Drawing No:** Arbttech TCP 01  
**Scale:** 1:100 @ A0  
**Drawn:** JCH

Tree Category	Tree Category	Tree Category	Tree Category
T01	T02	T03	T04
T05	T06	T07	T08



This drawing was produced in colour. A monochrome copy should not be relied upon.

## 8. Document Production Record

Document number	Editor	Signature	Position	Issue number	Date
Arbtech TSR 01	Jon Hartley	[REDACTED]	Principal Arboriculturist	02	05/07/23

### Limitations

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