

Trees and Construction

BS5837:2012 Tree Survey, Arboricultural Impact Assessment & Method Statement

Site: 2 Vernon Close, Edgerton, Huddersfield, HD1 5QE

Ref: 251343/A1_AIA



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- May 2025 -

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Revision	Description	Date
/	/	/

1. INTRODUCTION

1.1 **Instruction:** This advice has been prepared in respect of the tree related planning considerations at 2 Vernon Close, Edgerton, Huddersfield, HD1 5QE (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 assessment is produced in accordance with BS5837 and is secondary to arboricultural constraints advice by email. The objective of this report is to assess the proposed scheme and provide recommendations regarding the potential impact on trees and vice versa with associated tree works, tree protection details and recommendations for the scheme in consideration for trees.

1.4 Following instruction the consultant surveyed the site on the 1st May 2025 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 has an overlay of the proposed scheme to enable this review. The TCP informs this assessment and is used as a base layer for the appended 'Tree Protection Plan' (hereafter; TPP); the TCP, tree survey data table and TPP are at Appendix III.

2. SITE INFORMATION & TREE ASSESSMENT

2.1 The site currently comprises an undeveloped plot bound by residential properties.

2.2 **Proposal:** It is understood that a proposed scheme involves the construction of a residential property and detached garage. This is confirmed as per the client's proposed site plan as illustrated on the TCP.

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 potential construction area.

2.4 The trees -

2.4.1 The tree survey and assessment resulted in the BS5837 quality/retention categories of 'B - moderate' and 'C - low' being attributed to the trees as well as those of curtailed life expectancy recorded as 'U - poor'.

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.

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 (251343/TCP/01).

NOTE: This information as s.3 for the '*tree survey assessment*' is included as an objective and general overview of the trees and consideration for retention and protection. It is included herein for reference and context and is supplemented with a review of the scheme as the AIA (section 4) and the AMS 'considerations' (section 5).

3.2 General Considerations for Tree Retention / Removal

3.2.1 Based on the offsite location of T1, T2, T4 - T6 and T8 - T13, their retention and protection is to be assumed as part of the scheme.

3.2.2 There is a smaller scale trees with limitations on the current amenity contribution or useful remaining life expectancy, categorised as 'C - low'.

These 'C' category trees should not constrain nor significantly guide a scheme, although protection may be preferable to retain canopy cover on site. 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.

3.3 Further to the above information, the proposed scheme (as illustrated on the TCP) is reviewed hereafter at s.4 as an Arboricultural Implications Assessment (hereafter; AIA).

4. SCHEME / IMPLICATIONS ASSESSMENT

- 4.1 For the purpose of this assessment, the proposed site plan is used as a basis for consideration. This takes account of anticipated tree removals, tree protection options and potential alterations to account for arboricultural features; as per s.1.6 and s.2.2 herein, the TCP shows the ‘*proposed site plan*’ as an overlay for review.
- 4.2 The proposed scheme conflicts with Ash saplings at site. These saplings should not constrain the scheme and can be removed to facilitate the proposed scheme.
- 4.3 The proposed new access to the garage encroaches the crown of the offsite ‘U’ category tree T13. However, this can simple be pruned by lateral branch reduction back towards the boundary to clear the proposed new access.
- 4.4 The proposed garage is within the RPA of the offsite T12. This incursion is minor and at the outer extents of the RPA, hence, the impact is nominal and a tree-root sensitive foundation is not considered necessary. However, manual excavations and careful root pruning are recommend to minimise the ground impact.
- 4.5 Following the above considerations for trees, the trees are clear of the active construction area. However, the installation of temporary tree protection will be required to ensure no impact on trees from access, vehicles and material storage.
- 4.6 Further to the above, the following tree works are required prior to site works.

TREE WORK SUMMARY

NUMBER	TREE REMOVALS / PRUNING WORKS	
T13	Prune	Lateral branch reduction back towards the boundary to clear the proposed access.
Ash saplings (see TPP)	Remove	Remove in order to facilitate the scheme.
Retained trees		Protection by placement of fixed Heras panels around the crown/RPA extents, to have no access during construction.

- 4.7 Further to the above review and in consideration for the tree removals and need to protect retained trees, the following section contains said details as an Arboricultural Method Statement (Application Stage).

5. METHOD STATEMENT (Application Stage)

5.1 Arboricultural Construction Restrictions

5.1.1 The following restrictions are considered relevant for tree protection purposes which are illustrated on the appended Tree Protection Plan:

- a) Tree works; are to be completed prior to any site works: tree works not specified within the associated arboricultural method statement (or leaning against or attaching of objects to a tree) are not permitted unless agreed in writing by the council.
- b) Protective Barrier Fencing (hereafter; PBF); is to be installed around the retained trees immediately after the tree works and prior to the site works commencing.
- c) Construction Exclusion Zone (hereafter; CEZ); following the installation of PBF the fenced off section is to act as a CEZ and be supplemented with ground protection for RPA sections outside of fenced off areas as the CEZ.
- d) Material Handling; no chemicals / materials are to be transported / stored / used / mixed within exposed grounds on site; all chemical / cement storage, transport or use will be pre-prepared with impermeable liner and detail within a Construction Management Plan.
- e) Site Management; no fires are to be lit and no machinery, plant or vehicles are to be washed down within 10m of a tree's canopy, within a RPA / CEZ, and the RPA / CEZ may not be breached, i.e. no mechanical digging or scraping is permitted within a RPA / CEZ.
- f) Sensitive Landscape; only following construction completion can the PBF be removed and any remaining soft landscape works be undertaken (ground levels to be retained within RPAs and works undertaken manually with non-mechanical hand tools).

5.2 Arboricultural Site Monitoring / Supervision

5.2.1 The site should be checked by a qualified arboriculturist throughout the construction processes to ensure the tree protection measures are adhered to, thus -

- (a) pre-commencement to confirm tree works and inspect installed tree protection;
- (b) during construction to ensure adherence to this AMS; and
- (c) prior to removal of tree protection after construction completion to sign off the site for correct tree protection.

5.3 Protective Barrier Fencing (PBF) Specification

5.3.1 Barrier fencing is to be installed (and signed off by way of arboricultural supervision) following the completion of the tree works. It is illustrated on the Tree Protection Plan and is to remain in situ for the entire duration of preparation/construction processes unless otherwise agreed in writing by the council.

5.3.2 The barrier fencing is to consist of a series of Heras panels secured in place by driven scaffold posts or a scaffold frame to ensure that the fencing lines are well braced to resist impact, and site hoarding around the application boundary to prevent access to the RPA/CEZ areas around the approved works.

5.4 Underground utilities

5.4.1 Underground utilities are to be installed as per a dedicated plan and be clear of RPA by design. Otherwise, and if RPAs cannot be avoided, the following restrictions are recommended for underground utilities within RPAs:

- Any necessary excavations to be undertaken sensitively using either a no-dig method (e.g. Air-Spade) and/or under arboricultural supervision;
- Any exposed roots shall be packed with a clean damp sand (not builders sand) and wrapped in hessian sacking to protect them;
- Small roots which are identified (those less than 25mm diameter) may be carefully pruned back with a clean sharp tree saw; and
- Larger roots which are identified (those greater than 25mm in diameter) are to be retained and protected as they may be necessary for a tree's health and stability.

5.5 Ground Works within RPAs

5.5.1 No direct RPA incursion is anticipated, with exception of soft and hard landscaping - retained levels detail to be demonstrated by the client in the form of a 'site levels plan'.

5.5.2 Any excavations within a RPA or designated CEZ (the area enclosed by PBF) must:

- Only be undertaken when the construction works are completed; and
- Use sensitive excavation techniques to protect the tree roots and their existing growing conditions.

5.6 Landscape Detail

5.6.1 The finer details of the site landscaping proposals are to be illustrated on a landscape plan. This is to include the exact proposals for hard and soft landscaping together with the details for any new trees' planting locations, species and stock selection, installation and maintenance; this is to be undertaken by the appointed landscape architect who will have the full support of the arboricultural consultant where required.

5.7 Report Handling

5.7.1 This report is released to the client and architect to be distributed at their discretion and the consultant is available for queries relating to this report and/or trees.

5.7.2 The proposed scheme is reviewed in respect of the arboricultural constraints and is considered to be achievable in line with the BS5837 guidance. The recommendations herein may be approved by the council as a means of authorised tree works and tree protection.

5.7.3 This AMS and the TPP may be approved by the council in support of the application as a means of authorised tree protection measures; all site personnel will have access to a copy and the tree work and protection details are to be inspected as per s.5.2 for '*Arboricultural Monitoring / Supervision*'.

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 (251343/TCP/01) As appended (251343/TCP/01_proposed scheme)
Tree Protection Plan:	As appended (251343/TPP/01)

TREE SURVEY IN ACCORDANCE WITH BRITISH STANDARD 5837:2012 'TREES IN RELATION TO DESIGN, DEMOLITION & CONSTRUCTION - RECOMMENDATIONS'

CLIENT: PROJECT REF: 251343 SITE: 2 Vernon Close, Edgerton, Huddersfield, HD1 5QE
CONTACT: / SURVEY DATE: 1st May 2025 ARB CONSULTANT: Tony Banner TechCert (ArborA) TechArbor A

TREE REF. #	SPECIES	AGE	HEIGHT (in m)	CANOPY (in m) N - S - E - W				STEM (in mm)	RPA (in m)	CLEARANCE (in m)	1st BRANCH (in m)	VITALITY	LIFE EXPEC.	NOTES	BS CAT.	MANAGEMENT
T1	Cypress; Cupressus, Cupressaceae	M	10	2	3	3	3	370	4.4	2	2	Normal	20 - 40	Offsite, part of collective canopy group.	B 2	
T2	Spruce; Picea, Pinaceae	M	8	2	1	2	2	200	2.4	2	/	Normal	10 - 20	Offsite, part of collective canopy group.	C 2	
G1	Holly, Lilac, Sycamore	SM	4 - 6	/	/	/	/	100	1.2	1	/	Fair	10 - 20	Saplings and shrubs growing towards the boundary, ivy covered.	C 2	
T3	Ash; Fraxinus, Oleaceae	SM	7	2.5	2.5	2.5	2.5	180	2.2	3	3	Fair	10 - 20	Situated towards the boundary, ivy in crown, stem lean south corrected in crown.	C 3	
T4	Cherry; Prunus, Rosaceae	M	8	1	6	3.5	2	380	4.6	2.5	3	Normal	10 - 20	Offsite, one of a pair, at higher level than site.	C 2	
T5	Spruce; Picea, Pinaceae	SM	8	3.5	3	3.5	3.5	330	4.0	/	/	Normal	20 - 40	Offsite tree.	B 2	
T6	Purple Norway Maple; Acer, Aceraceae	SM	5	4	3	3	3	240	2.9	2.5	2	Fair	10 - 20	Offsite, previously topped.	C 2	
T7	Rowan; Sorbus, Rosaceae	Y	4	1	1	1	1	90	1.1	2	2	Normal	10 - 20	Young tree situated towards the boundary.	C 3	
T8	Birch; Betula, Betulaceae	M	16	4	7	3	4	500	6.0	2.5	3	Normal	20 - 40	Offsite, thick ivy in crown limits visual tree assessment.	B 2	Tree owner recommendation - sever ivy at base and reassess tree's condition once crown is unobscured by ivy.
T9	Whitebeam; Sorbus, Rosaceae	SM	12	1	2	2	1	180	2.2	3	3	Normal	10 - 20	Offsite tree.	C 2	
T10	Birch; Betula, Betulaceae	SM	16	3.5	3	3.5	3.5	250	3.0	4	3	Normal	20 - 40	Offsite, part of collective canopy group, stem close to boundary fence.	B 2	
T11	Birch; Betula, Betulaceae	SM	16	3	2	3	2	220	2.6	4	4	Normal	20 - 40	Offsite, part of collective canopy group, stem close to boundary fence.	B 2	
T12	Ash; Fraxinus, Oleaceae	M	12	4	4	5	5	400	4.8	3.5	3	Poor	< 10	Offsite, signs of Ash Dieback Disease in crown, bark lesions and cankers throughout the crown, sparse crown, limited future potential.	U	Tree owner recommendation - fell tree as preventative health and safety measure.
T13	Elder; Sambucus, Sapindaceae	SM	4	0	3	1	2	120	1.4	2	2	Poor	< 10	Offsite/boundary line tree (site boundary unclear), growth influenced by now removed tree	U	

TREE SURVEY 'KEY' - BRITISH STANDARD 5837:2012 'TREES IN RELATION TO DESIGN, DEMOLITION & CONSTRUCTION - RECOMMENDATIONS'

TPO/CA	-	On client request: presence of Tree Preservation Orders (TPO) / site location within a Conservation Area (CA) & date checked;
TREE REF. #	-	Tree reference number: tag or plan number (T - individual tree, G - group of trees/shrubs, H - hedge);
SPECIES	-	Genus, species and/or common name;
AGE	-	Age classification (NP - new planting, Y - young, EM - Early-Mature, SM - semi mature, M - mature, LM - late mature, OM - over mature);
HEIGHT (in m)	-	Approximate height of tree in metres;
CANOPY (in m) N - S - E - W	-	Approximate branch spread in metres of the four principal compass points;
STEM (in mm)	-	Stem diameter in millimetres: measured in accordance with s.4.6 of BS5837;
RPA (in m)	-	Circle radius of the Root Protection Area: calculated using the stem diameter (single/multiple stem variant, as outlined within BS5837);
CLEARANCE (in m)	-	Crown clearance in metres above the adjacent ground level;

TREE SURVEY IN ACCORDANCE WITH BRITISH STANDARD 5837:2012 'TREES IN RELATION TO DESIGN, DEMOLITION & CONSTRUCTION - RECOMMENDATIONS'

CLIENT:

PROJECT REF: 251343

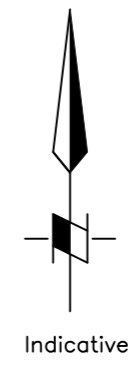
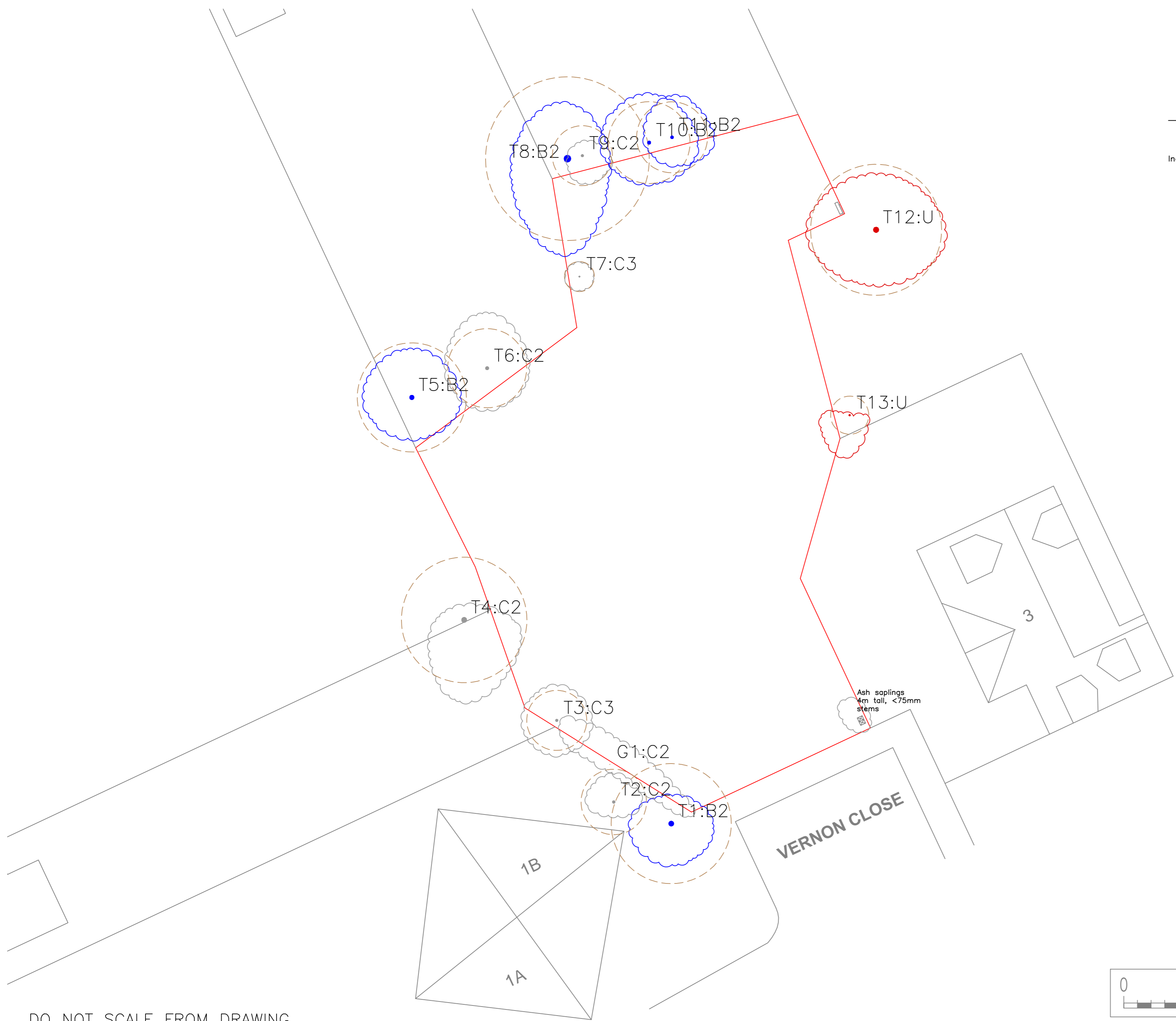
SITE: 2 Vernon Close, Edgerton, Huddersfield, HD1 5QE

CONTACT: /

SURVEY DATE: 1st May 2025

ARB CONSULTANT: Tony Banner TechCert (ArborA) TechArbor A

TREE REF. #	SPECIES	AGE	HEIGHT (in m)	CANOPY (in m) N - S - E - W	STEM (in mm)	RPA (in m)	CLEARANCE (in m)	1st BRANCH (in m)	VITALITY	LIFE EXPEC.	NOTES	BS CAT.	MANAGEMENT
	IST BRANCH (in m)	-	Clearance in metres to first significant branch and direction of growth (where relevant);										
	VITALITY	-	Physiological condition typically gauged from canopy cover and annual extension growth (good, fair, poor, dead);										
	ESTIMATED REMAINING CONTRIBUTION	-	Approximate number of years a tree will continue to contribute without the need for oppressive arboricultural intervention, categorised in years as <10, 10-20, 20-40 and >40;										
	NOTES	-	Structural and physiological condition observations;										
	BS CAT.	-	BS5837 tree quality assessment category: resulting from structural/physiological condition and remaining contribution (approximate useful life expectancy); Standard retention category U : in such a condition that any existing value would be lost within 10 years; Standard retention category A : high quality and value, in such a condition as to be able to make substantial contribution of 40+ years; Standard retention category B : moderate quality and value, in such a condition as to make a significant contribution of 20+ years; Standard retention category C : low quality and value, currently in adequate condition to remain until new planting could be established 10+ years; Standard retention sub-category, mainly due to: 1 - Arboricultural values, 2 - Landscape values, 3 - Cultural values, including conservation;										
	MANAGEMENT	-	Preliminary management recommendations (as appropriate);										
	' * '	-	Within the survey schedule denotes an estimate										



KEY

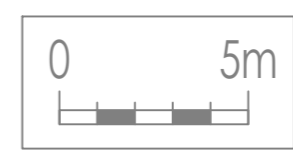
- Tree Crown Spread
- Root Protection Area (RPA)
- Tree Stem
- T1 Tree No.

Tree Condition Category

- A
- B
- C
- U

The surveyed trees are illustrated on this Constraints Plan which is prepared in accordance with British Standard BS5837: 2012 'Trees in Relation to Design, Demolition and Construction - Recommendations'

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REV.	DESCRIPTION	DWN	CHK'D	DATE
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CLIENT

PROJECT 251343
 2 Vernon Close, Edgerton,
 Huddersfield, HD1 5QE

TITLE
 Tree Constraints Plan

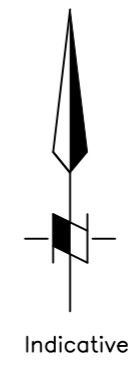
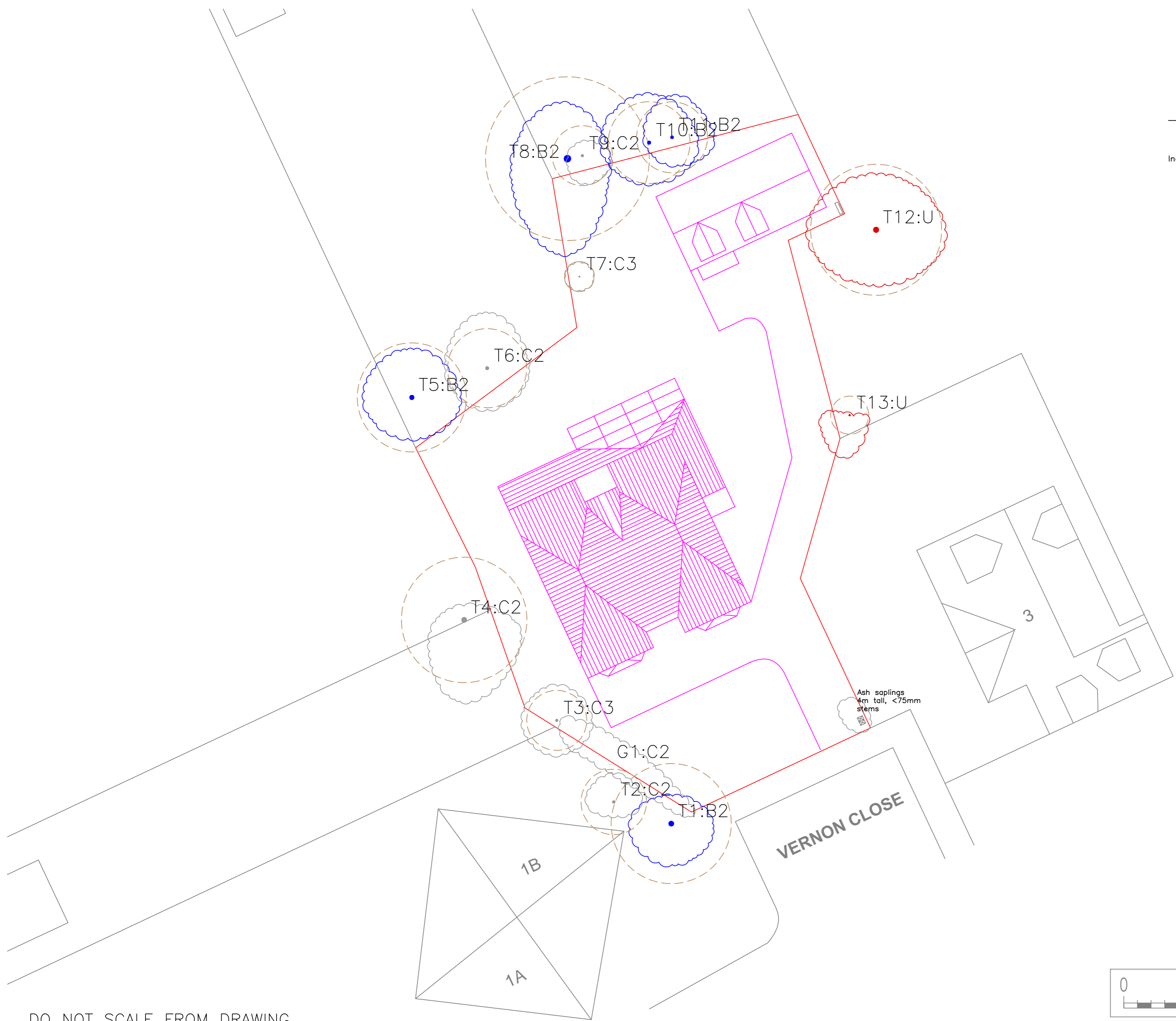
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 A2
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KEY

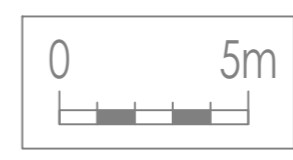
- Tree Crown Spread
- Root Protection Area (RPA)
- Tree Stem
- T1 Tree No.

Tree Condition Category

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- B
- C
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/	Proposed scheme overlay for review	TB	AT	19/05/25
REV.	DESCRIPTION	DWN	CHK'D	DATE

CLIENT

PROJECT
 251343
 2 Vernon Close, Edgerton,
 Huddersfield, HD1 5QE

TITLE
 Tree Constraints Plan

DWN	DATE	CHK'D	DATE	APP'D	DATE	SCALE
RCK	16/05/2025	TB	19/05/2025			1:200

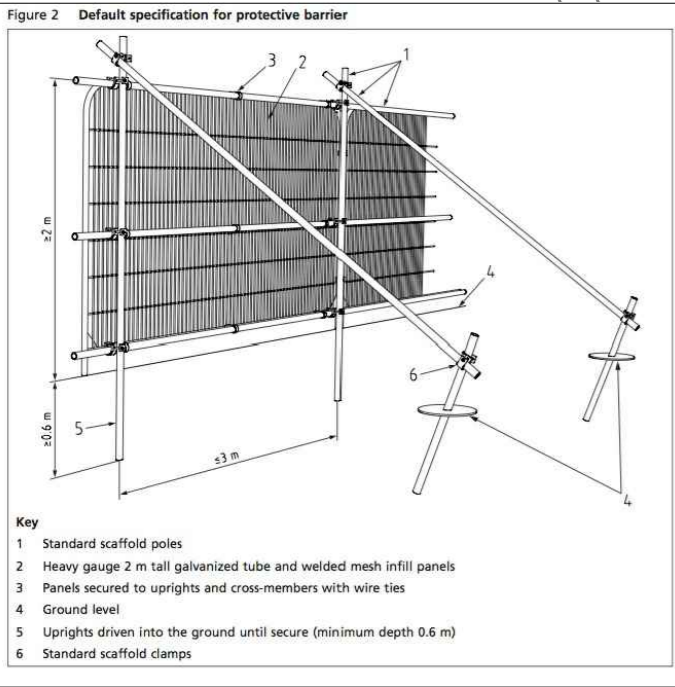
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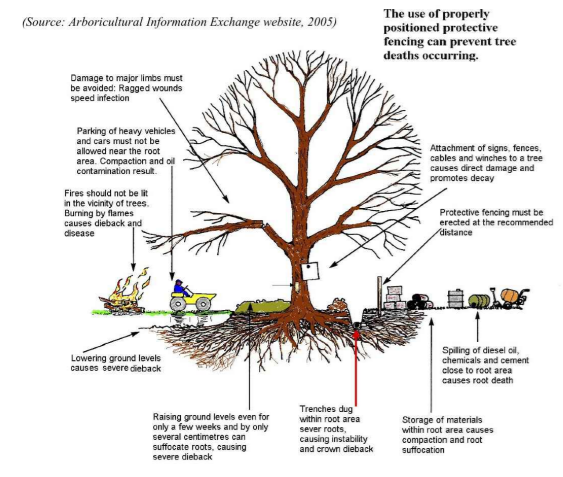
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Protective Barrier Fencing – Example Design



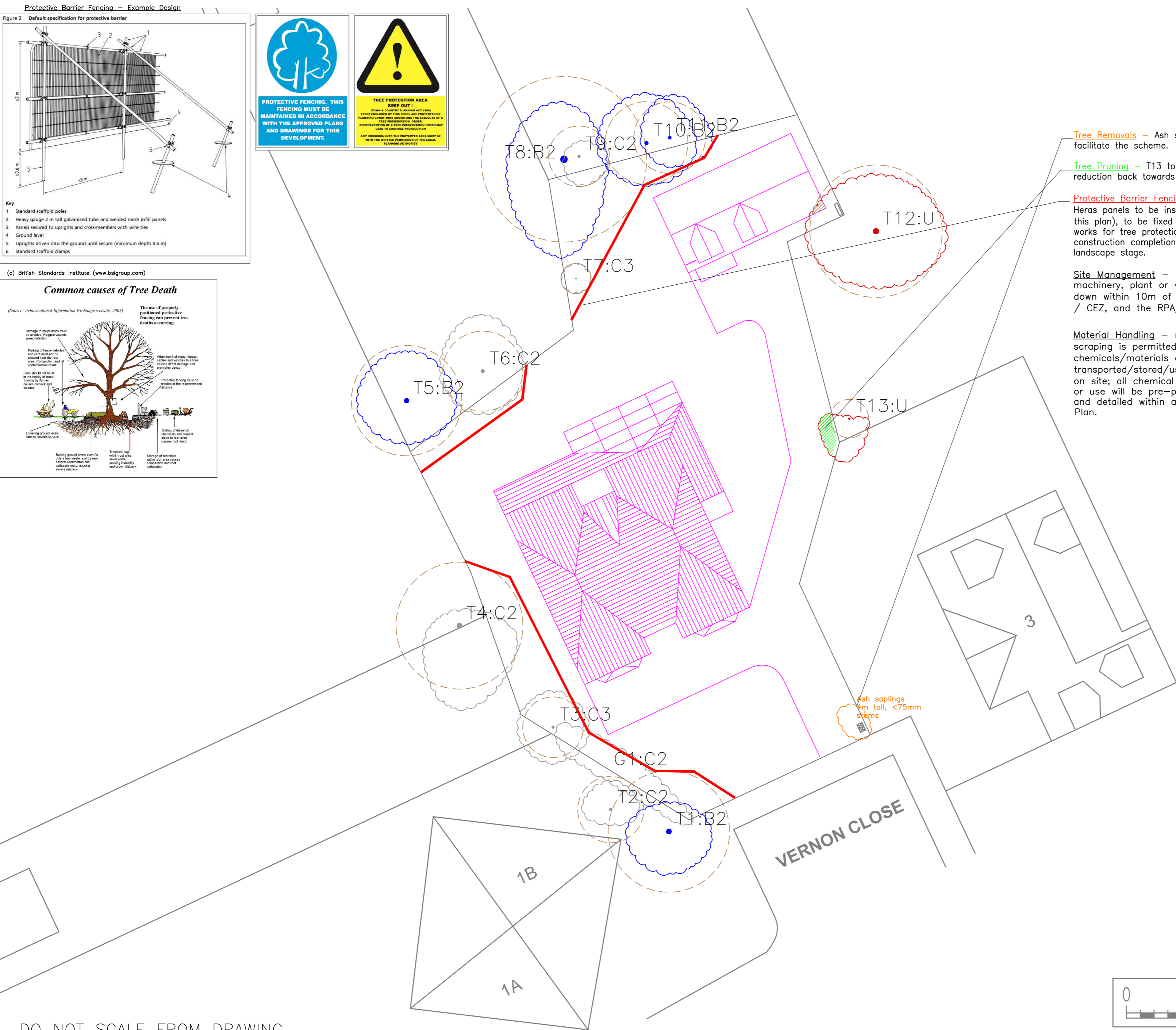
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Common causes of Tree Death



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Tree Removals – Ash saplings to be removed to facilitate the scheme.

Tree Pruning – T13 to be pruned by lateral branch reduction back towards the boundary.

Protective Barrier Fencing (PBF): Heras panels to be installed (as per the illustration on this plan), to be fixed in place for the duration of site works for tree protection and to remain until construction completion, then to be removed for landscape stage.

Site Management – no fires are to be lit and no machinery, plant or vehicles are to be washed down within 10m of a tree's canopy, within a RPA / CEZ, and the RPA/CEZ may not be breached.

Material Handling – no mechanical digging or scraping is permitted within a RPA/CEZ, and no chemicals/materials are to be transported/stored/used/mixed within exposed RPAs on site; all chemical / cement storage, transport or use will be pre-prepared with impermeable liner and detailed within a Construction Management Plan.

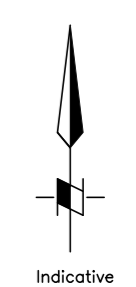
KEY

- Tree Crown Spread
- Root Protection Area (RPA)
- Tree Stem
- T1 Tree No.

Tree Condition Category

- A
- B
- C
- U

The surveyed trees are illustrated on this Constraints Plan which is prepared in accordance with British Standard BS5837: 2012 'Trees in Relation to Design, Demolition and Construction – Recommendations'



/	Uses TCP as base layer	TB	AT	19/05/25
REV.	DESCRIPTION	DWN	CHK'D	DATE

CLIENT

PROJECT 251343
2 Vernon Close, Edgerton, Huddersfield, HD1 5QE

TITLE
Tree Protection Plan

DWN	DATE	CHK'D	DATE	APP'D	DATE	SCALE
RCK	16/05/2025	TB	19/05/2025			1:200

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