

Arboricultural assessment & method statement

Land to rear Cayton Lawns, Oak Drive, Alderbury, Salisbury, SP5 3AJ

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Site location and report purpose

Site location



This aerial image is provided courtesy of Google. The yellow line indicates the approximate site boundary and is for illustrative purposes only.

Report purpose

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

More specifically, the development proposal is to construct a detached residential dwelling on land severed from the existing garden of Cayton Lawns, Oak Drive, Alderbury, Salisbury SP5 3AJ.

This report includes:

- A **Tree protection plan** illustrating tree locations, categories, the location of the proposed development, and the proposed tree protection measures.
- An **Arboricultural assessment** (section 1 of the report) providing an analysis of the tree issues to assist the LPA in assessing the impact on local character.
- An **Arboricultural method statement** (section 2 of the report) describing how retained trees will be protected and managed during the development activity.
- **Appendices** (**Appendix 1** – Background administrative information, and data collection; **Appendix 2** – Tree schedule and explanatory notes; and, **Appendix 3** – QR Codes for SGNs).
- A companion document to supplement the main report titled ***Manual for managing trees on development sites*** **(Version 2.1)**, which provides explanations of how retained trees will be managed on site in the form of Site Guidance Notes (SGNs) covering the relevant issues.

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1: Arboricultural assessment

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

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

	British Standard 5837 Category		
	A (High quality)	**B (Moderate quality)**	**C (Low quality)**
Remove	None	None	**G1 (part)**
Prune	None	None	None
Protect using special precautions See Notes below	None	**T11**	**T8, T9, G10, T12**
Post development considerations	None	None	None

T = Tree; G = Group

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

1.2 The impact of tree removals on local character

My assessment of the impact of tree removals on local character is as follows:

Individual tree within G1

Group 1 is a line of cypress that have been subject to formalised topiary management and are located well within the southern extents of the existing garden. This form of tree management has meant that the trees have been maintained as small ornamental features and are obscured from surrounding vantages outside of the private garden. The proposed scheme will require the removal of an individual tree at the eastern end of the line. The removal of this single tree will have no adverse impact on visual amenity or landscape character.

1.3 The impact of tree pruning on local character

Other than pruning for normal maintenance and prudent management, no trees will be pruned because of this development.

1.4 The impact of works in precautionary areas

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

Trees T8, T9, G10, T11, and T12

For these trees, there is minor encroachment into their initial circular RPAs due to the construction of the proposed custom designed permeable driveway access. However, BS 5837 (5.3.1) does allow for encroachment, if any new surfacing is low impact, and if it can be demonstrated that any lost area can be compensated for elsewhere. In this situation, the encroachment is on the outer extent of the RPAs and relatively small compared to the area that will be left undisturbed. In my experience, healthy trees can tolerate such minor incursions into their RPAs without any significant adverse impacts on health, and this will be the case is this situation. In summary, if the guidance set out in SGN 7 *Excavating in RPAs* and SGN 9 *Installing/upgrading surfacing in RPAs*, is observed,

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then I believe that the proposed works can be implemented without any significant adverse impact on the trees, and therefore local character.

Installation of new services or upgrading of existing services

All retained trees may be affected by the installation of new services or upgrading of existing services. However, as it is often difficult to clearly establish the detail of services until the construction is in progress, this advice should be held as precautionary. Where possible, it is proposed to use the existing services into the site and keep all new services outside RPAs. Where existing services within RPAs require upgrading, or new services must be installed in RPAs, great care must be taken to minimise any disturbance. Trenchless installation will be the preferred option, but if that is not feasible, any excavation must be carried out by hand according to the guidelines in SGN 11 *Installing services in RPAs*.

1.5 Post development considerations

If trees are retained or planted too close to occupied buildings and/or garden amenity space, it is sometimes claimed that they can cause excessive shade or anxiety, which interferes with the normal use of the property. In extreme cases, this can result in pressure from future owners to fell or severely prune, thus reducing the long-term contribution of the trees to local character. However, in my experience, these problems are extremely rare and there is very little evidence that such pressures ever result in any significant harm to the wider setting. Indeed, there is an increasing body of evidence that the benefits from trees close to occupied areas significantly outweigh any disadvantages caused by shade or anxiety. Furthermore, important trees can be protected using tree preservation orders, which come with an overarching presumption to retain protected trees unless the normal use of the property is harmed to a significant extent. To my knowledge, there is no published evidence to support that trees are being lost to the detriment of local character for these reasons. I have considered these concerns in my analysis for this site and my conclusions take full account of those important issues. In this case, there are no trees close enough to the proposed residential building where they are likely to interfere with its normal use.

1.6 Summary of impact on local character

This proposal will result in the loss of a single low-quality tree that is located well within the site and obscured from surrounding vantages. All the significant and sustainable boundary tree cover will remain intact and no high or moderate quality trees will need to be removed. The matter of adverse impacts on retained trees due to post-development pressures to fell or prune has been considered and I concluded that none of the retained trees will be affected. The construction activity and proposed changes may affect further trees if appropriate protective measures are not taken. However, if adequate precautions to protect these retained trees are specified and implemented through the arboricultural method statement included in this report, then the development proposal will have no detrimental impact on tree health or the contribution of trees to character in the wider setting.

For these reasons, I conclude that the proposed development would not cause an unacceptable or adverse impact on the long-term vitality of the retained trees, and therefore the character and appearance of the area. Furthermore, it fully aligns with the broad guidance set out in the National Planning Policy Framework.

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2: Arboricultural method statement

2.1 Site Guidance Notes (SGNs)

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

- SGN1 *Monitoring tree protection* (www.barrelltreecare.co.uk/technical-guidance/sgn01)
- SGN2 *Fencing protected trees* (www.barrelltreecare.co.uk/technical-guidance/sgn02)
- SGN3 *Ground protection* (www.barrelltreecare.co.uk/resources/technical-guidance/sgn03)
- SGN4 *Pollution control* (www.barrelltreecare.co.uk/resources/technical-guidance/sgn04)
- SGN5 *Site cranes & piling rigs* (www.barrelltreecare.co.uk/technical-guidance/sgn05)
- SGN6 *Height restrictions* (www.barrelltreecare.co.uk/resources/technical-guidance/sgn06)
- SGN7 *Excavating in RPAs* (www.barrelltreecare.co.uk/technical-guidance/sgn07)
- SGN8 *Removing surfacing and structures in RPAs* (www.barrelltreecare.co.uk/technical-guidance/sgn08)
- SGN9 *Installing/upgrading surfacing in RPAs* (www.barrelltreecare.co.uk/technical-guidance/sgn09)
- SGN10 *Installing structures in RPAs* (www.barrelltreecare.co.uk/technical-guidance/sgn10)
- SGN11 *Installing services in RPAs* (www.barrelltreecare.co.uk/technical-guidance/sgn11)
- SGN12 *Landscaping in RPAs* (www.barrelltreecare.co.uk/technical-guidance/sgn12)

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

2.2 Identification of areas to be protected

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

2.3 Arboricultural supervision

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

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

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

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

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

Brief operation summary	Trees affected	Location of detailed explanations
Pre-commencement meeting: Meeting on site with all parties to agree protective measures, as described in SGN 1. Will be carried out before any significant site works begin.	All trees	SGN 1 *Monitoring tree protection*
Tree felling and pruning: Contractor will carry out agreed works as described in Appendix 2. Will be completed before any significant site works begin.	Fell tree within **G1**	Appendix 2
Installing fencing and ground protection: Agreed tree protection measures will be installed and checked, as described in SGN 2 and SGN 3. Will be completed before any significant site works begin.	Fencing all trees Ground protection for trees **T11** and **T12**	Tree protection plan, SGN 2 *Fencing protected trees*, and SGN 3 *Ground protection*
Pollution control near retained trees: Any pollution control measures identified during risk assessment will be installed as described in SGN 4. Will be completed before any potential pollutants arrive on site.	All trees	SGN 4 *Pollution control*
Regular arboricultural supervision: Provision will be made to carry out and record agreed arboricultural supervision, as described in SGN 1.	All trees	SGN 1 *Monitoring tree protection*
Excavating in RPAs: These operations will be carried out as described in SGN 7.	**T11** and **T12**	SGN 7 *Excavating in RPAs*
Installing permeable surfacing in RPAs: These operations will be carried out as described in the SGN 9.	**T8**, **T9**, **G10**, **T11** and **T12**	SGN 9 *Installing/upgrading surfacing in RPAs*
Installing services in RPAs: These operations will be carried out with care, as described in SGN 11.	All trees	SGN 11 *Installing services in RPAs*
Landscaping in RPAs: These operations will be carried out with care, as described in SGN 12.	All trees	SGN 12 *Landscaping in RPAs*
Removing tree protection: Protection can only be removed when there is no risk of damage to retained trees, as described in SGN 1.	All trees	SGN 1 *Monitoring tree protection*

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

If unanticipated issues arise on site not referenced in the above explanations, further guidance on how to manage them can be found in the accompanying Manual.

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2.5 Construction method statement (heads of terms summary)

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

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

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Appendix 1: Background administrative information and data collection

A1.1 Table 3: Background administrative information

	Background administrative information
Report date & reference	**4th March 2022; 20133-AA2-PB**
Tree protection plan reference	**20133-2**
Instructing client	The Elite Carriage Company Ltd
Instructions	Visit the site, assess the relevant trees, prepare a schedule of their details, describe the impact of the proposal on those trees and identify the tree protection issues in an arboricultural method statement with a tree protection plan, if appropriate.
Provided documents	• Drawing number '**9466-SHA-SW-XX-DR-A-110 Rev P1**', received by email on 29th July 2020 • Drawing number '**9466-130 Rev P1**', received by email on 3rd March 2022
Report author and credentials	Phil Brophy has taken and passed the LANTRA Professional Tree Inspection course (https://www.lantra.co.uk/awards/product/professional-tree-inspection), is a Chartered Forester (www.charteredforesters.org), and a professional member of the Arboricultural Association (www.trees.org.uk), and is fully qualified to undertake the assessments in this report (https://www.barrelltreecare.co.uk/who-we-are/).
Report limitations	• We have not checked if there is any statutory protection on the trees because this can delay the production of the report. If any tree works are proposed before a planning consent is given, then the possible existence of any statutory protection must be checked with the LPA. • This report does not consider ecological or archaeological issues, or any other matter beyond the assessment of the trees.
Technical references	In preparing the analysis in this report, we considered the guidance and advice in the following technical references: • Climate Change Act (2008) www.legislation.gov.uk/ukpga/2008/27/contents • Town and Country Planning Act 1990 www.legislation.gov.uk/ukpga/1990/8/contents • National Planning Policy Framework, published by the MHCLG www.gov.uk/government/publications/national-planning-policy-framework--2 • BS 5837 (2012) *Trees in relation to design, demolition and construction – Recommendations*, BSI www.shop.bsigroup.com/ • BS 8545 (2014) *Trees: from nursery to independence in the landscape – Recommendations*, www.shop.bsigroup.com/ • BS 3998 (2010) *Tree work – Recommendations*, BSI www.shop.bsigroup.com/ • *Trees in the Townscape: A Guide for Decision Makers*, published by the Trees & Design Action Group http://www.tdag.org.uk/ • *Trees in Hard Landscapes: A Guide for Delivery*, published by the Trees & Design Action Group www.tdag.org.uk/ • National Joint Utilities Group (2007) Volume 4, Issue 2: *Guidelines for the planning, installation and maintenance of utility apparatus in proximity to trees* www.njug.org.uk/publications/

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Appendix 1: Background administrative information and data collection

A1.2 Table 4: Data collection

	Data collection
Date of site visit	31st July 2020
People present during site visit	Phillip Brophy
Weather & visibility	Clear and dry with average visibility
Limitations to observations	• The inspection of the trees for the purposes of assessing their condition and work requirements was made on the basis that they will be annually inspected in the future to identify any changes in condition and review the original recommendations. For these reasons, the tree assessment advice only remains valid for one year from the date that the trees were last inspected. • All observations were of a preliminary nature and did not involve any climbing or detailed investigation beyond what was visible from accessible points at ground level. • Observations of trees outside the site boundaries are confined to what was visible from within the site. • All dimensions were estimated unless otherwise indicated.
Tree Preservation Orders (TPOs), Conservation Areas, and tree categorisation	TPOs cannot always be reliably interpreted from the documentation to identify which trees are protected, especially as time passes and site conditions change from when they were originally made. It is common for TPO plans to be inaccurate and schedules often become out of date as trees die or are removed. Frequently, trees deteriorate and, although they may be technically protected by the TPO, are in such poor condition or causing such unreasonable inconvenience that their suitability for retention becomes questionable. In a planning context, if poor trees are assessed as unsuitable for retention, then it would be inappropriate to show them as a material constraint in development planning. For these reasons, although TPOs do need to be considered, they do not form the primary basis for tree categorisation. Poor quality trees assessed as not worthy of retention will be shown as such, irrespective of whether they are protected or not. Similarly, good quality trees that are not protected will still be shown as material constraints. The same rationale will be applied to Conservation Areas.
Tree location and numbering	Each tree and group, was inspected, and the numbering scheme is indicated on the tree protection plan. Where trees were found on site that were not included on the provided plan, then their approximate positions and canopy extents are indicated on the plan.
Recording of tree data	For each identified tree and group, the information collected was recorded on the tree schedule in Appendix 2 and the tree protection plan.
Compliance of data collection with BS 5837	The data collection is fully compliant with the advice in subsection 4.4.2 of BS 5837. When collecting this information, specific consideration was given to any low branches that may influence future use, age class, physiological condition, structural condition, and remaining contribution. Where appropriate, crown spreads were also noted where they differed from those shown on the provided land survey.
Calculation of RPAs	Following the recommendations in Table D1 of BS 5837, the diameter of each tree was rounded up to the next 2.5cm increment, with the radius of a nominal circle and the resultant RPA taken directly from that table. This information is listed for each tree in the tree schedule in Appendix 2.

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Appendix 2: Tree schedule and explanatory notes

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

Tree No	Species	Height (m)	Diameter (cm) @ 1.5m	Maturity	Low Branches	Category	Notes	Tree Works	RPA radius (m)	RPA area (m2)
All retained trees								Carry out safety check and lift over site to 3-4 m as necessary.		
G1	Cypress	3	20	Mature	-	C	Formally managed topiary	Fell selected individual	2.4	18
T2	Oak	13	35	Maturing	-	B	-	-	4.2	55
T3	Scots pine	18	42.5	Mature	-	B	-	-	5.1	82
T4	Horse chestnut	9	42.5	Mature	-	C	Suppressed poor form	-	5.1	82
T5	Scots pine	13	45	Mature	-	B	-	-	5.4	92
G6	Oak, sycamore	13	25	Maturing	-	C	Combined canopy, majority of trees are located on adjacent land	-	3.0	28
T7	Oak	11	25	Young	-	C	Located on bank, asymmetric form due to adjacent trees	-	3.0	28
T8	Ash	8	20	Young	-	C	Young but established tree	-	2.4	18
T9	Oak	9	20	Young	-	C	Young but established tree	-	2.4	18
G10	Cypress	14	45	Mature	-	C	Combined canopy form, out of keeping with local landscape character	-	5.4	92
T11	Oak	19	65	Mature	-	B	Located on bank on adjacent land on eastern side of road	-	7.8	191
T12	Beech	18	40	Maturing	-	C	Codominant form, located on bank on adjacent land, east of existing roadway	-	4.8	72

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Appendix 2: Tree schedule and explanatory notes

Explanatory Notes

- **Abbreviations:**
  G: Group
  T: Tree

- **Botanical tree names:**

Ash	: *Fraxinus excelsior*
Beech	: *Fagus sylvatica*
Cypress	: *Cupressus* sp
Horse chestnut	: *Aesculus hippocastanum*
Oak	: *Quercus robur*
Scots pine	: Pinus sylvestris
Sycamore	: *Acer pseudoplatanus*

- **BS 5837 (2012) compliance:** All data has been collected based on the recommendations set out in subsection 4.4 of BS 5837.
- **Tree inspections and site limitations:** Each tree was subjected to a quick visual check level of inspection. Where there is restricted access to the base of a tree, its attributes are assessed from the nearest point of access. Climbing inspections are not carried out during this level of inspection and, if heavy ivy is present, tree condition is assessed from what can be seen from the ground. A separate note is recorded if further investigation may be required to clarify its status.
- **Crown spreads:** Crown spread dimensions are not listed in the tree schedule because they are illustrated on the land survey base to all the plans in this document. Where crown spreads of significant trees on site are found to deviate from those shown on the provided land survey, we have noted it in the text of the report and annotated it on our plans.
- **Dimensions:** All dimensions are estimated unless otherwise indicated with an asterix (*) after the figure.
- **Species:** Species identification is based on visual observations. Where there is some doubt over tree identity, sp is noted after the genus name to indicate that the species cannot be reliably identified at the time of the survey. Where there is more than one species in a group, only the most frequent are noted and not all the species present may be listed.
- **Height:** Height is estimated to provide a broad indication of the size of the tree.
- **Trunk diameter:** Trunk diameter is estimated or measured (with a diameter tape), at the discretion of the consultant, and recorded in 2.5cm increments as advised in BS 5837 Table D1. Estimates may be made where access is restricted, direct measurement is prevented because of ivy on the trunk, or the tree is assessed as low quality. The point of measurement and the adjustments for stem variations are as advised in Figure C1 of BS 5837.
- **Maturity:** In planning context, maturity provides a simplistic indication of a tree's ability to cope with change and its potential for further growth. For the purposes of this report, young indicates a potential to significantly increase in size and a high ability to cope with change, maturing indicates some potential to increase in size and a medium ability to cope with change, and mature indicates little potential to increase in size and limited ability to cope with change.
- **Low branches:** Any low branches that would not be feasible for removal during normal management and should be considered as a design constraint are noted here and explained in the notes.
- **Category:** Our assessment automatically considered tree physiological/structural condition (BS 5837, 4.4.2.5h), and so these are not listed separately in the schedule. Additionally, the category accounts for the remaining contribution (BS 5837, 4.4.2.5i) as greater than 40 years for A trees, greater than 20 years for B trees, at least 10 years for C trees and less than 10 years for U trees, so this is also not listed separately in the schedule. Category A, B and C trees are automatically listed as sub-category 1 unless otherwise stated.
- **Notes:** Only relevant features relating to physiological or structural condition and low branches that may help clarify the categorisation are recorded. If there are no notes, then the presumption should be that no relevant features were observed.
- **Tree works:** The recommended tree works are based on the quick visual check level of inspection and only intended to address significant hazards identified during that inspection. The following points should also be considered before carrying out any works:

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Appendix 2: Tree schedule and explanatory notes

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

- **Future tree safety inspections:** Due to the time that may elapse between the original survey and the start of development, all trees should be re-inspected as part of the standard risk management process before any works start on site. Our assessment of the trees was carried out on the basis that a re-inspection would be carried out within a year of the assessment visit and our advice on tree condition must be reviewed annually from the date of that visit.

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

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

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