

BS 5837:2012 Tree Survey, Arboricultural Impact Assessment, Arboricultural Method Statement and Tree Protection Plan

Awbrook House
Slugwash Lane
Haywards Heath
RH17 7TB

Date: 04/08/2026

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1. Instruction

Usherwood Arboriculture have been instructed to provide a tree survey, arboricultural impact assessment, arboricultural method statement and tree protection plan regarding the construction of an ancillary store building at Awbrook House, Slugwash Lane, Haywards Heath, RH17 7TB. The document has been compiled in accordance with BS5837:2012, Trees in relation to design, demolition and construction-Recommendations.

Drawing/Document Ref.	Title	Drawn/Written by
01	Drawings as Existing	Rubix Planning
02 Rev: B	Drawings as Proposed	AlthamLewis Architects

Table 1. Key drawings and documents supplied for consideration within this report

2.Executive Summary

This document considers the impact of proposed development upon 7 individual trees located in proximity to the store building.

No trees are required for removal as a result of the proposal, however, several trees have previously been removed on the northern boundary.

The building will extend into a small proportion of the root protection areas of 2 individual trees comprising a category B oak and category C yew.

The proposed ingress is not expected to have a major impact upon the subject trees, whilst the Arboricultural Method Statement and Tree Protection Plan seek to minimise any impacts upon the remaining tree stock.

A replacement tre strategy comprising yew hedging and 5 hornbeam trees has been proposed to provide native screening on the site's northern boundary.

3.The Site

The application site comprises a detached house set within extensive grounds. Mature trees grow across the site including in proximity to the proposed development. The development area located on the site's northern boundary consists of an existing stable block with a level hardstanding. The subject trees grow predominantly to the immediate west of the area.

Soil conditions

The British Geological Survey, Geology of Britain viewer describes the local bedrock geology as Upper Tunbridge Wells Sand-Sandstone and siltstone, interbedded. There is no specific information available regarding local superficial deposits.

Legal Constraints

Trees can sometimes be the subject of a Tree Preservation Order (TPO) or a property may be situated within a designated conservation area. Both a TPO and conservation area designation require the owner/occupier or those wishing to work on trees to seek the Council's consent or provide written notice prior to carrying out any works. It is a criminal offence to carry out any works to protected trees without the Council's consent. The site is not situated within a Conservation Area or subject to a TPO.



Image above, courtesy of Google Maps with the application area outlined in red.

4. Tree Survey

The trees were assessed on 27/02/2026 in accordance with recommendations and guidelines contained within British Standard 5837:2012 - 'Trees in relation to design, demolition and construction-Recommendations' henceforth referred to as BS5837. The survey was carried out in relation to the condition and quality of trees growing either within or near the boundary of the site. Where details have been omitted including the heights of crown break and the direction of the first major lateral branch, these details were not seen as being relevant to this application. Where access allowed, tree heights were measured with a Haglof electronic clinometer and trunk diameters with a diameter tape measure. Crown spreads were measured with a tape measure or paced out at the four cardinal points.

All trees were assessed from the ground utilizing the Visual Tree Assessment method as developed by Mattheck and Breloer (The Body Language of Trees, Research for Amenity Trees No 4 Department of the Environment).

This tree survey should not be treated as a hazard assessment, it has been carried out to inform the planning process with regards to the appropriate retention and protection of trees as visual and ecological assets within the landscape. However, where clear and obvious defects are observed, the relevant parties would be informed.

Tree Assessment and Categorization

Tree quality ratings have been assessed in accordance with BS5837's Table 1, Cascade chart for tree quality assessment.

U = Trees in such a condition that any existing value would be lost within 10 years and which should in the current context, be removed for reasons of sound arboricultural management. (Trees that have serious, irreparable structural defects, such that their early loss is expected due to collapse or ill health including trees that will become at risk due to the loss of other U category trees).

A = Trees of high amenity quality and value in such a condition as to be able to make a substantial contribution (a minimum of 40 years is suggested).

- 1) Trees that are particularly good examples of their species if rare, unusual or essential components of groups or formal or semi-formal arboricultural features.
- 2) Trees, groups of trees or woodland which provide a definite screening or softening effect to the locality in relation to views in or out of the site, or those of particular visual importance.
- 3) Trees groups or woodlands of significant conservation, historical, Commemorative or other value (e.g. veteran tree or wood pasture).

B = Trees of moderate quality and amenity value: those in such a condition as to be able to make a significant contribution (a minimum of 20 years is suggested).

- 1) Trees that might be included in the high category but are down-graded because of impaired condition (e.g. remediable defects).
- 2) Trees, groups of trees or woodland that form distinct landscape features but do not form essential components of the landscape.
- 3) Trees with clearly identifiable conservation or other cultural benefits.

C = Trees of low quality and amenity value currently in adequate condition to remain until new planting is established (a minimum of 10 years is suggested) or trees under 150 mm stem diameter.

- 1) Unremarkable trees of very limited merit or such impaired condition that they do not qualify in higher categories.
- 2) Trees presenting groups or woodlands but not with a significantly higher landscape value and or offering low or temporary/transient screening benefit.
- 3) Trees with no conservation or other cultural benefits.

Note: Category C trees are the least suitable for retention, where they would impose a significant constraint on the development their removal for development purposes may be considered acceptable by the LPA.

5.Tree Survey Data & Appraisal

This survey concerns 7 individual trees, full details of the survey data can be found in the Tree Survey Schedule at **Appendix A**. An explanation of Tree Quality category ratings is set out on the previous page.

Category A individual trees and groups of trees.

1 tree has been graded as category A (trees of high quality) as part of this survey.

Category B individual trees and groups of trees.

5 trees have been graded as category B (trees of moderate quality) as part of this survey.

Category C individual trees and groups of trees.

1 tree has been graded as category C (trees of low quality) as part of this survey.

Category U individual trees and groups of trees.

No trees have been graded as category U (trees unsuitable for retention) as part of this survey.

3 tree species have been recorded as part of this survey, their common and botanical names are set out within the table below.

Common Name	Botanical Name
Common beech	<i>Fagus sylvatica</i>
English yew	<i>Taxus baccata</i>
Pedunculate oak	<i>Quercus robur</i>

Table 2. Tree species recorded on site and their botanical names.

6. Arboricultural Impact Assessment

The Arboricultural Impact Assessment (AIA) sets out the potential risks and threats associated with proposed construction to trees both within and near to an application site and seeks to minimise those risks through the implementation of a sound and recognised methodology set out within an arboricultural method statement.

Construction and development in general can impact trees in a number of ways, the most notable being damage to the tree's root system leading to physiological decline and structural instability. BS5837 recognises this and sets out recommendations to minimise damage associated with the effects of soil compaction and root severance.

The AIA also considers the impacts of tree loss on the character of the immediate and wider landscape.

Tree Removals

No trees are to be removed as a result of the proposed development, however, a few trees have been historically removed from the site's northern boundary in proximity to the existing stable block.

Replacement trees

Replacement trees comprise 5 x *Carpinus betulus* 'Frans Fontaine', an upright form of our native hornbeam.

The replacement trees will be planted on the northern boundary with a minimum stem girth of 16-18cm, otherwise known as Advanced nursery stock.

The 5 hornbeams will be underplanted with a native English yew hedge.

Retained trees

Tree protective fencing and ground protection will protect the root protection areas (RPAs) of the following trees.

T3 Common beech

T4 Pedunculate oak

T5 English yew

T6 Pedunculate oak

T7 Pedunculate oak is situated a sufficient distance from proposed works to not require any further protection. The RPA of **T7** extends beneath the existing and retained stable hardstanding.

The proposed building extends into the RPAs of Trees **T1** yew and **T2** oak. The ingress is described over page.

T1 yew. The RPA ingress is approximately 1.2m², or 3.75% of the tree's total RPA of 32m².

T2 oak. The RPA ingress is approximately 11m², or 5.5% of the tree's total RPA of 201m².

The ingress on both trees will comprise excavation to install standard strip foundations.

Excavation will initially be carried out by hand and under arboricultural supervision.

Root Protection Areas- General information.

BS 5837 describes the root protection area (RPA) as a layout design tool indicating the minimum area around a tree deemed to contain sufficient roots to maintain the tree's viability, and where the protection of the roots and soil structure is treated as a priority.

The **Root Protection Areas (RPA)** have been calculated in accordance with Table D1 of BS5837:2012. Notional RPA's are plotted on the arboricultural impact assessment plan at **appendix C**. The RPA is defined by the formula in paragraph 4.6 from the British standard and may be refined by considering current on-site constraints to root activity such as buildings, walls, earthworks, hard paving and services.

Root systems and compaction.

Root systems can easily be damaged during construction works, leading to the sometimes-rapid decline of valuable trees. The biggest problem for trees on or close to construction sites is the compaction of soil caused by inappropriate vehicular movement and storage of materials especially where the site is founded on a compressible clay.

Numerous surveys have shown that a significant proportion of a tree's roots proliferate in the top 600-1000mm of soil. There will of course be roots that may go down to depths of 3 metres or more although these will be in the minority. Roots in the upper soil surface find it far easier to intercept moisture, acquire oxygen and perform gaseous exchange. You also find that as soil depth increases so does its strength or compaction, making it harder for roots to exploit.

Root morphology differs from species to species and is largely dependent on the soil type and ground conditions, however the fine roots responsible for moisture and nutrient uptake can last anything from 10 days to over a year (Eissenstat and Yanai, 1997), with the tree producing new fine roots on a regular basis. The larger and more structural roots are a permanent feature of the tree and convey moisture and nutrients from the soil via the fine roots, into the trunk and canopy. The larger roots are of course responsible for the tree's stability as well as being areas of carbohydrate storage. Younger trees are more able to adapt to change and have more potential energy to explore alternative rooting environments whereas more mature trees are slower to react to a changing soil environment and are adapted to expend their energy on other important functions.

The National Geology of Britain Viewer advises that the local soil comprises a bedrock geology of sandstone. Therefore, we suggest that the risk of soil compaction is low. Nevertheless, a precautionary approach will be adopted with the correct installation of tree protective fencing and ground protection.

Root severance

As mentioned above, the roots are responsible for a number of functions including stability and the transport of water and nutrients. Studies have shown that trees can withstand and recover from the loss of a proportion of their root systems, especially where those roots have been removed in a single direction. The proposal may expose roots specifically from trees **T1** yew and **T2** oak. However, a precautionary approach will be taken with supervised hand dig only for the initial excavation of the building base. The arboricultural method statement includes recognised root pruning parameters which will be observed during excavation operations.

7. Arboricultural Method Statement (AMS)

The arboricultural method statement sets out a precautionary approach towards tree protection. Any operations including access, proposed within the RPA (or crown spread where this is greater) will be described within an arboricultural method statement, to demonstrate that the operations can be undertaken with minimal risk of adverse impact to retained trees.

Phase 1-Access facilitation and pre-start tree works.

Building contractor to install tree protective fencing and ground protection as described below.

- A site meeting will be held following the installation of tree protection measures, (see site supervision).

Phase 2- Installation of tree protective fencing and ground protection.

- Erect protective barrier fencing in locations shown on the tree protection plan at **appendix C**. A protective fencing diagram can be found at **appendix D**. Barriers will consist of a heras type panel inserted into rubber blocks and reinforced with a stabiliser strut. Two clamps either end of each section will ensure the area within the fence (CEZ) remains out of bounds during all construction activities.



Images above show protective fencing installed as per BS5837:Fig 3A with rubber blocks and stabilizer struts driven into the ground.

Ground protection

- Ground protection will comprise of either a proprietary ground protection mat such as TrakMat or if approved by the Local Planning Authority, closely abutted ply boards of 18mm thickness installed upon 150mm layer of hand spread woodchip mulch. The mulch will be laid upon a porous membrane as shown in the images below and in the location shown within the Tree Protection Plan at **appendix C**.



Images above from a site managed by Usherwood Arboriculture and showing the three stages of ground protection installation.

Image 1 laying of geotextile membrane.

Image 2- hand spreading of 150mm depth of woodchip mulch.

Image 3- Trakmat ground protection mats directly laid upon woodchip mulch. Trakmat may be replaced with ply or scaffold boards, subject to the Council's approval.

- Woodchip mulch may be purchased from most good tree surgeons and once construction is complete, the woodchip mulch may either be removed from site or reused in garden flower beds.

Phase 3- Excavation of foundations and construction of building.

- Once the tree protection measures have been implemented and signed off by the project arboriculturalist, construction may commence.
- The outer face of the strip foundation will be marked out and the initial 500mm depth dug out with the use of hand-held tools only. This exercise will take place under arboricultural supervision.
- We do not expect to encounter any substantial roots, however, if roots believed to be from **T1** and **T2** are exposed, they will be carefully pruned to the excavation edge with the use of sharp bypass loppers and secateurs.
- Root pruning will be carried out by the project arboriculturalist and confined to roots of <25mm diameter.
- Roots will be cut with sharp secateurs or bypass loppers, perpendicular to their direction of travel.
- Exposed roots of 25mm-50mm will be retained and not cut, unless approved by the LPA tree officer.
- Roots of 50mm diameter and above will be retained and the construction methodology modified accordingly.

- Any exposed root ends will be covered with damp hessian sacking to be removed prior to the pouring of foundations.
- If any roots are present at the foundation edge, the outer edge of the excavation closest to the tree will be lined with an impermeable sheet such as DPM. This is to avoid toxic leachates associated with curing concrete from entering the surrounding soil and damaging fine root hairs.
- Once above ground, construction may commence without the requirement for specific arboricultural methodologies.

Pre-commencement meeting & Site supervision.

- A pre-commencement meeting will take place between the project arboriculturalist and building contractor, the LPA tree officer will also be invited to attend. This is for the project arboriculturalist to clarify that tree protection measures have been correctly implemented prior to the commencement of works and that any unforeseen issues may be dealt with in a timely manner.
- A single site supervision visit will be carried out to oversee the excavation of ground in proximity to trees **T1** and **T2**.
- Site supervision visits will be pictorially documented with findings shared with the client and LPA tree officer within 5 working days of the visit (**see appendix E**).

General measures to be adopted in proximity to trees.

- No further trees or vegetation are to be removed other than that described as being removed within approved arboricultural and landscape documents.
- All tree protection measures will be set in place prior to commencement of any works relating to the approved planning consent.
- No bonfires on site.
- No storage of products or mixing of materials within the RPA's of trees.
- No materials are to be stored within the confines of the protective fencing (CEZ).
- Storage of materials on soft ground in proximity to any other trees and hedges away from construction is to be avoided.
- No discharging of any products associated with construction near trees or hedges
- No refueling/topping up of hydraulic fluids etc. on plant machinery within or close to the RPA of trees.
- There will be no lowering or raising of soil levels within the root protection areas of retained trees except where specified and agreed by the LPA.

- There will be no excavation or trenching for the installation of services within the root protection areas of retained trees except where specified and agreed by the LPA.

8. Conclusion

Provided that works are carried out in accordance with the Arboricultural Method Statement and Tree Protection Protection Plan, there should be no impact upon the subject trees.

Replacement tree and hedge planting using native species will provide an important screen on the northern boundary of the garden. I therefore suggest that this scheme should be considered as being arboriculturally acceptable.

9. Qualifications & Experience

I have been involved in the horticultural and arboricultural industries for over 40 years, firstly as a contractor and for the last 20 years as a Local Authority tree officer and consultant. I hold the AA Tech cert arb, and ND Arb (RFS) as well as being a Lantra accredited Professional Tree Inspector.

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Usherwood Arboriculture

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Appendix A: Tree Survey Schedule

Trees have been listed on the schedule with both their common and scientific names.

Tree height is normally measured and rounded up to the nearest metre for trees above 10 metres in height using a Haglof electronic clinometer.

Stem or trunk diameters were measured using a diameter tape in mm at 1.5 metres above ground where access allowed, otherwise diameters have been estimated.

Crown spread has been measured in metres from the trunk to the tips of the live lateral branches taken at the four-cardinal points N-E-S-W using a ground tape.

Age Class

Young - Trees in the first fifth of full life expectancy

Semi-mature - Trees in the second fifth of full life expectancy

Early-mature - Trees in the third fifth of full life expectancy

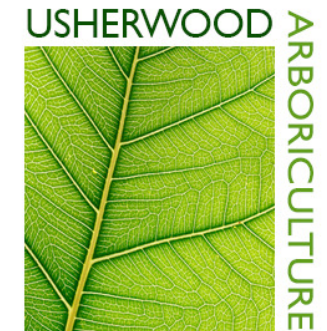
Mature - Trees in the fourth fifth of full life expectancy

Post-mature – Trees having reached full life expectancy and trees in natural decline

Veteran - Trees of interest biologically, culturally and aesthetically due to certain features and/or age.

ERCY-The estimated remaining contribution in years calculated considering the tree's species, location, current age and physiological and structural condition at the time of the survey.

BS5837 Survey Data

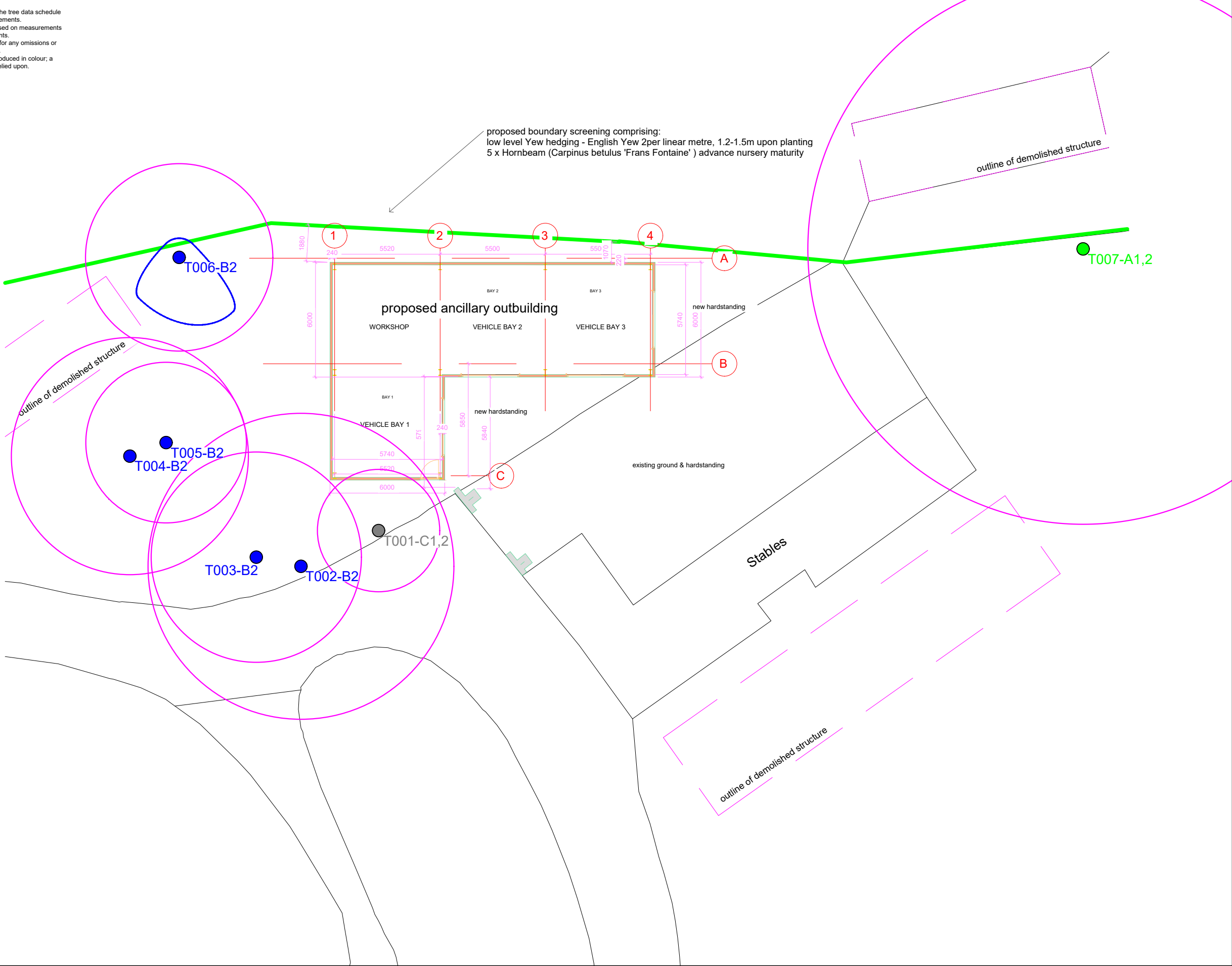


Ref.	Species	Measurements	General Observations	Category	Recommendations
T001	English yew (Taxus baccata)	Height (m): 8 2 stems (mm): 180, 200 Life Stage: Early Mature Rem. Contrib.: 40+ Years	Asymmetric growth over drive.	C1,2 RPA Radius: 3.2m. Area: 32 sq m.	Pre construction: Install tree protective fencing and ground protection. During construction: Refer to the Arboricultural Method Statement.
T002	Pedunculate oak (Quercus robur)	Height (m): 20 Stem Diam(mm): 670 Life Stage: Mature Rem. Contrib.: 40+ Years	Ivy on stem, cut Ivy at base.	B2 RPA Radius: 8.0m. Area: 201 sq m.	Pre construction: Install tree protective fencing and ground protection. During construction: Refer to the Arboricultural Method Statement.
T003	Common beech (Fagus sylvatica)	Height (m): 20 Stem Diam(mm): 460 Life Stage: Early Mature Rem. Contrib.: 40+ Years	Ivy on stem. cut Ivy at base.	B2 RPA Radius: 5.5m. Area: 95 sq m.	Pre construction: Install tree protective fencing and ground protection. During construction: No action required.
T004	Pedunculate oak (Quercus robur)	Height (m): 15 Stem Diam(mm): 520 Life Stage: Early Mature Rem. Contrib.: 40+ Years	Ivy on stem. Cut Ivy at base.	B2 RPA Radius: 6.2m. Area: 121 sq m.	Pre construction: Install tree protective fencing. During construction: No action required.

Ref.	Species	Measurements	General Observations	Category	Recommendations
T005	English yew (Taxus baccata)	Height (m): 10 Stem Diam(mm): 350 Life Stage: Early Mature Rem. Contrib.: 40+ Years		B2 RPA Radius: 4.2m. Area: 55 sq m.	Pre construction: Install tree protective fencing. During construction: No action required.
T006	Pedunculate oak (Quercus robur)	Height (m): 16 Stem Diam(mm): 410 Spread (m): 1N, 1E, 4S, 3W Life Stage: Early Mature Rem. Contrib.: 40+ Years	Ivy-clad stem. Cut Ivy at base. Asymmetric growth due to historically removed tree.	B2 RPA Radius: 4.9m. Area: 75 sq m.	Pre construction: Install tree protective fencing. During construction: No action required.
T007	Pedunculate oak (Quercus robur)	Height (m): 23 Stem Diam(mm): 1200 Life Stage: Mature Rem. Contrib.: 40+ Years	Large tree away from proposed construction area, included for completeness.	A1,2 RPA Radius: 14.4m. Area: 651 sq m.	Pre construction: No action required. During construction: No action required.

Appendix B: Arboricultural Impact Plan

General Notes
Do not scale off drawing - refer to the tree data schedule for accurate crown spread measurements.
Depictions of tree canopies are based on measurements taken to four cardinal compass points.
No liability of any kind is accepted for any omissions or inaccuracies in respect of this plan.
The original of this drawing was produced in colour; a monochrome copy should not be relied upon.
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Key

Trees
Showing Canopy extents, category colour and tag number (with category).

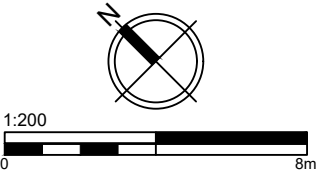
Category A
Trees of high quality with an estimated remaining life expectancy of at least 40 years.

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

Category 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.

Category U
Trees in such a condition that they can not realistically be retained as living trees in the context of the current land use for longer than 10 years.

BS 5837:2012 Root Protection Area



Drawing Title
Arboricultural Implication Plan

Client
Mr & Mrs Altendorff

Site/Project
Awbrook House, Slugwash Lane,
Haywards Heath, RH17 7TB

Scale/Sheet
1:200 - A3

Date
04/08/2026

Drawing No
UA/AIP/1

Rev
1

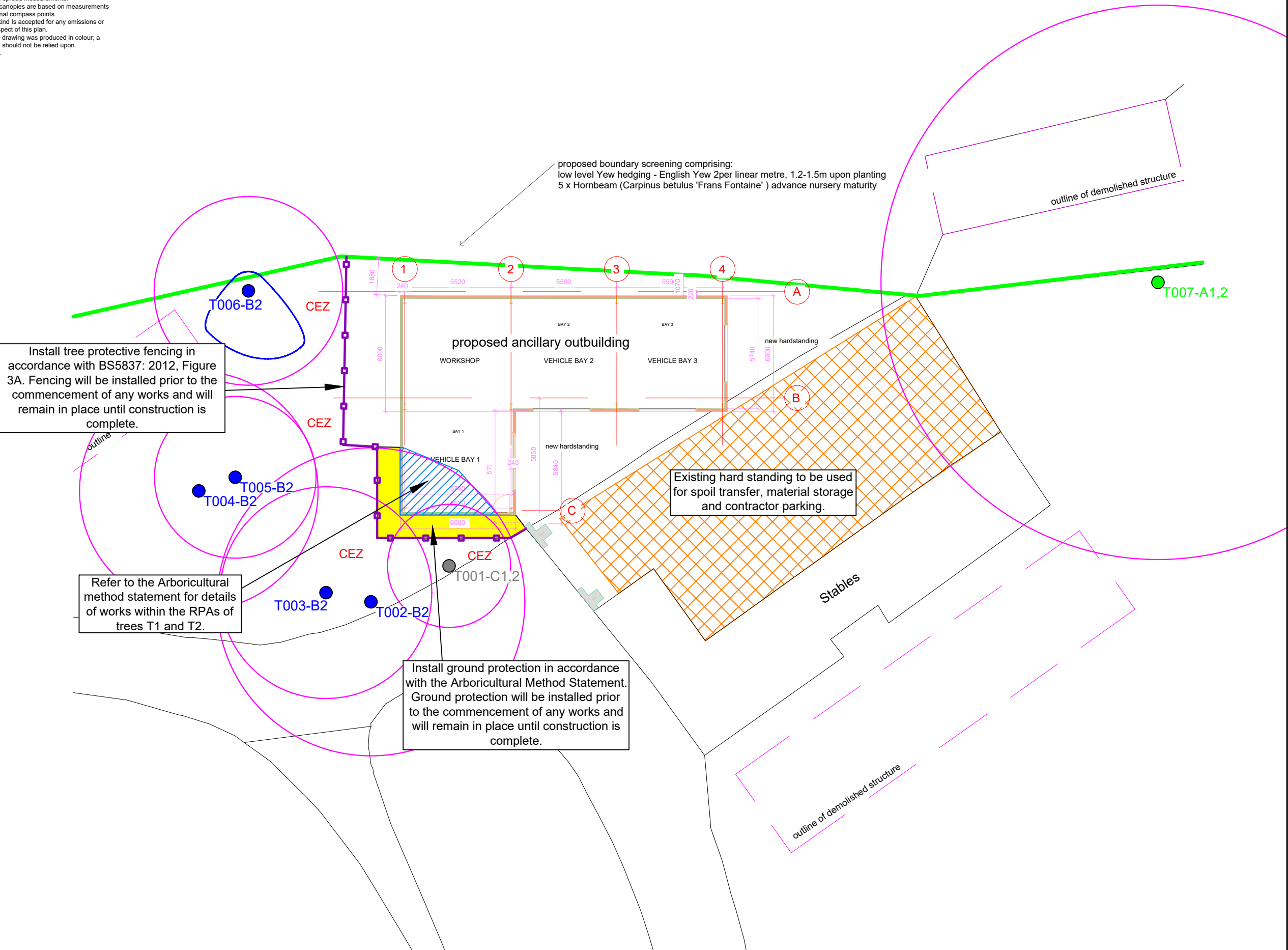
Drawn By
CS

Chkd By
LU

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Appendix C: Tree Protection Plans

General Notes
Do not scale off drawing - refer to the tree data schedule for accurate crown spread measurements.
Depictions of tree canopies are based on measurements taken to four cardinal compass points.
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Showing Canopy extents, category colour and tag number (with category).

Category A
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Category U
Trees in such a condition that they can not realistically be retained as living trees in the context of the current land use for longer than 10 years.

BS 5837:2012 Root Protection Area

Tree Protective Fencing

Ground Protection

Existing hard standing to be used for spoil transfer, material storage and contractor parking.

Refer to the Arboricultural method statement for details of works within the RPAs of trees T1 and T2.

Construction Exclusion Zone

1:200

Drawing Title

Tree Protection Plan

Client

Mr & Mrs Altendorff

Site/Project

Awbrook House, Slugwash Lane,
Haywards Heath, RH17 7TB

Scale/Sheet

1:200 - A3

Date

04/08/2026

Drawing No

UA/TPP/1

Rev

1

Drawn By

CS

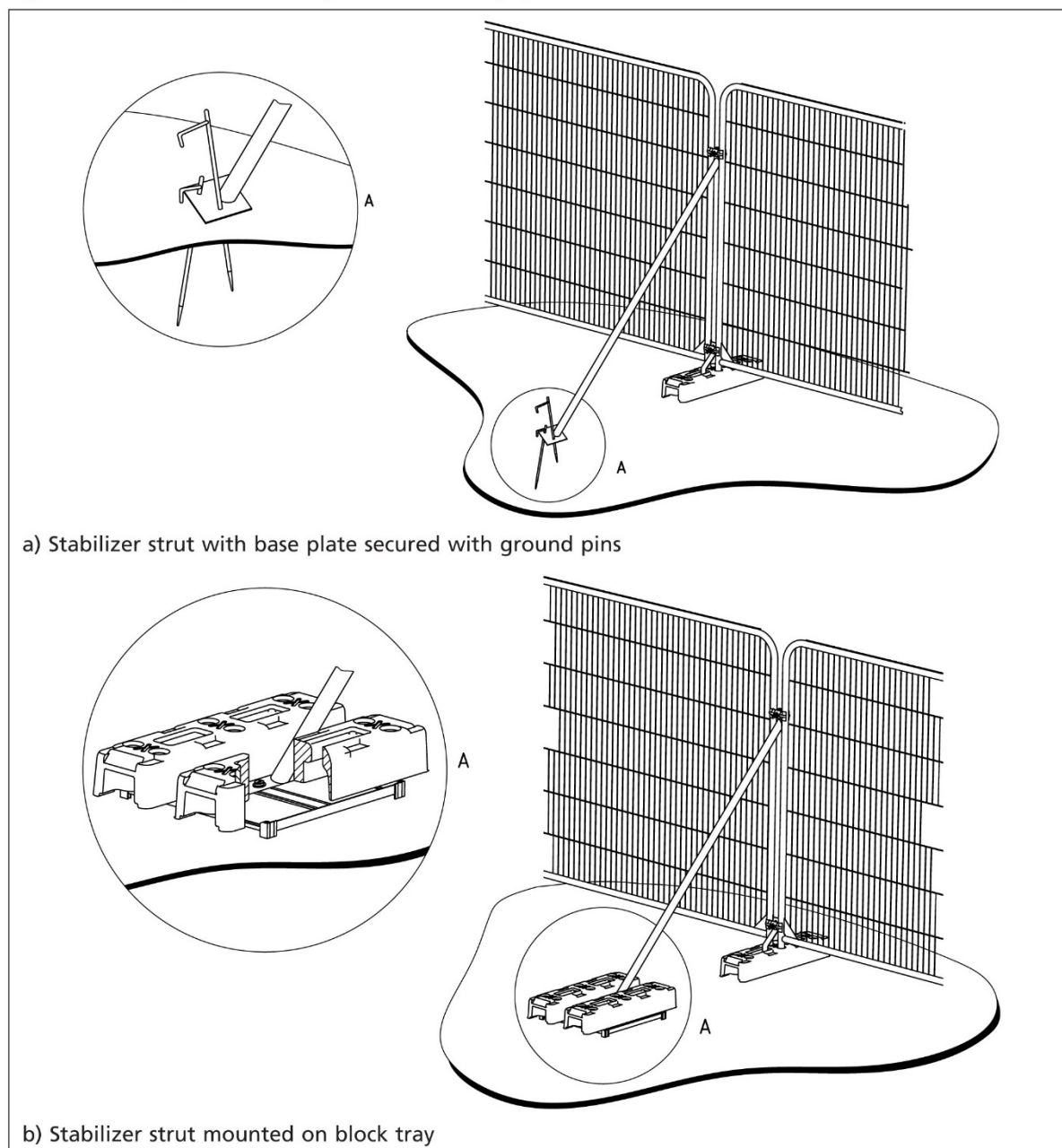
Chkd By

LU

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Appendix D: Tree Protective Fencing Example

Figure 3 Examples of above-ground stabilizing systems



Appendix E: Site Supervision Example

Date: _____ Time: _____ Site:		Planning application reference:	
Those present in addition to project arboriculturalist: Client /Agent: Project / Site manager: LPA arboricultural officer: Other (specify):			
	Yes	No	Action Required?
Tree Protection measures located in accordance with TPP?			
Any disturbance within construction exclusion zone?			
Any materials stored within construction exclusion zone?			
Any evidence of damage to tree roots, stems or canopies?			
Any works programmed before next planned site visit that may affect retained trees?			
Notes: 			
Signed:		Date:	

When is site supervision necessary-

Site supervision is normally specified where construction and development activity take place within or adjacent to the root protection area (RPA) of retained trees as calculated within the Arboricultural Impact Assessment (AIA) and described within the Arboricultural Method Statement (AMS).

The AMS will note where site supervision is recommended, and the local planning authority may require the provision of site supervision as a condition of planning consent.

Site supervision may cover several actions as set out below. The conclusions of each of the actions will be documented and shared with the client and local authority tree officer.

- Initial site meeting.
- Toolbox talk with all operatives having responsibility for works in proximity to trees.
- Correct installation of tree protection systems including fencing, ground protection, CCS, site huts etc.
- Technical supervision including excavation/trenching within RPAs, piling, installation of services, installation of lightweight structures such as bin and bike sheds, and installation of load bearing surfaces.

Reporting systems and site notes-

Additional notes taken during supervision of works within or close to the RPAs of retained trees.

Information will include the following-

- Date of works
- Description of works
- Operatives present
- Photographic records
- Scaled Section diagram and/or plan, showing location, size, and condition of any exposed roots.

Information will be shared with the client and local authority tree officer.