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ARBORICULTURAL REPORT
MORTIMER'S FARM
MORTIMERS LANE
FAIR OAK
HAMPSHIRE
SO50 7EA

JANUARY 2023

REVISED REPORT TO REVISED LAYOUT

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M: [REDACTED]

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C O N T E N T S

Arboricultural Report and Arboricultural Implications Assessment

1.0	Introduction	3
2.0	Site Visit	3
3.0	Site Description	3
4.0	Tree Survey Data	3
5.0	Tree Quality Assessment	8
6.0	Root Protection Areas	8
7.0	Legal Constraints	8
8.0	Arboricultural Implications Assessment	9
9.0	Conclusions	11
	<i>Important notes and Inspection caveats</i>	12

Arboricultural Method Statement

1.0	Contact details	13
2.0	Introduction	14
3.0	Phasing of Development	14
4.0	General Arboricultural Considerations	15
5.0	Supervision and Monitoring	16
	<i>Authors Credentials</i>	17

Appendix 1	Tree Quality Assessment Plan
Appendix 2	Root Protection Area Plan
Appendix 3	Tree Protection Plan
Appendix 4	Extract from BS5837:2012 – Figure 2 Default Specification for Protective Fencing
Appendix 5	Extract from BS5837:2012 – Figure 3 Examples of Above-Ground Stabilizing Systems.

1.0 INTRODUCTION

- 1.1 This report was instructed by Mr. Long of Lonmer Construction with regard to the proposed development at Mortimer's Farm, Mortimer's Lane, Fair Oak, Hampshire. The report details all trees over 75mm at 1.5m above ground level that are relevant to the siting of the proposed development. The position of the trees on the site is illustrated at **Appendix 1** on the plan.
- 1.2 The existing tree stock has been identified and graded in line with the current British Standard BS 5837 2012: Trees in relation to design, demolition and construction – Recommendations to enable informed decisions to be made regarding tree retention. The report also details methods of construction to be implemented to safeguard the retained trees.
- 1.3 This report details the constraints placed on the proposed development from the rooting area of the trees below ground and above ground by their size and position.
- 1.4 This report will therefore inform the planning process for the proposed development to minimise any negative impact on the existing tree stock and ensure that retained trees shall be in harmony with the proposed development enabling their long-term retention.

2.0 SITE VISIT

- 2.1 The site visit was undertaken on 30th July 2019. The trees were surveyed visually, externally and from ground level only. No samples or internal decay detection readings were taken for further analysis. All dimensions have been measured unless stated otherwise. Weather conditions at the time of the survey were overcast, windy with showers.

3.0 SITE DESCRIPTION

- 3.1 The site is located to the east of Fair Oak just south of the B3037. Currently it comprises of a number of barns and farm buildings, a central lawn area and a pond. There is an existing access onto Mortimers Lane. There are a number of mature trees on and around the site.

4.0 TREE SURVEY DATA

In accordance with BS 5837 2012: Trees in relation to design, demolition and construction – Recommendations, the characteristics of single-stemmed trees over 75mm stem diameter measured at 1.5m above ground level have been recorded and they have been categorised in accordance with Table 1 of BS5837: 2012. The following tree data tables should be read in conjunction with the annotated site plan shown at **Appendix 1** and the legend on the page following the tables.

Tree Number and Species	Height (m)	DBH (mm)	Branch Spread (m)				Existing Height Above Ground Level of Canopy and 1 st Significant Branch (m)	Age Class	Estimated Remaining Contribution (Years) & Physiological Condition	Comments	BS Category & Tree Work Necessary for Development	RPA (m ²)	RPA (m)
			N	S	E	W							
T1 Oak <i>Quercus</i> sp.	12	1050	6.5	6	5	5	2 4 North	OM	10-20 Poor	The B3037 to the north, the access and a parking area as well as a brick wall are all within the rooting area of the tree. Weed free area around tree. Girdled root east side. Large area of missing bark on north east of stem from mechanical damage, extends to approximately 1m high and 0.5m across. Poor wound occlusion. Decay at base of wound. Wound at base on west side of stem, decay at base. Missing bark, dead bark lifting away from main stem to 2.5m decay evident along length of wound. Previous past management, small limbs removed at 2m good wound occlusion. Adventitious shoots from old pruning wounds. Crown reduction on all major scaffold limbs in decline and has had significant die back throughout crown. HV power lines adjacent to east side of crown. Minor deadwood in crown.	C2 Remove and replacement plant	499	12.6

Tree Number and Species	Height (m)	DBH (mm)	Branch Spread (m)				Existing Height Above Ground Level of Canopy and 1 st Significant Branch (m)	Age Class	Estimated Remaining Contribution (Years) & Physiological Condition	Comments	BS Category & Tree Work Necessary for Development	RPA (m ²)	RPA (m)
			N	S	E	W							
T2 Oak <i>Quercus</i> sp.	15	1100	7	8	7	5	2 4 North	M	40 + Good	Sound base and lower stem. Buttress root grown over old saddle stone support. Minor wound at 1m on south side. Water sprouts on main stem and scaffold limbs.	A1 Retain and protect Crown raise to 3.5m removing adventitious shoots only	547	13.2
T3 Cedar <i>Cedrus</i> sp.	4	180*	2	2	2	2	1 2 East	SM	10-20 Fair	In adjacent garden within flower bed. Lost leader, poor form. Good vigour.	C2 Retain and protect	14	2.2
TG1 Oak and Sycamore <i>Quercus</i> and <i>Acer</i> sp.	7 - 14	Average 450	24		17		0 0.5 South	SM EM	40 + Fair Good	Adjacent to the pond, not inspected individually. Smallest Oak 25° east, die back. Remainder of trees are all vigorous with form typical of their species and no obvious signs of defects.	B2 Retain and protect	92	5.4

Tree Number and Species	Height (m)	DBH (mm)	Branch Spread (m)				Existing Height Above Ground Level of Canopy and 1 st Significant Branch (m)	Age Class	Estimated Remaining Contribution (Years) & Physiological Condition	Comments	BS Category & Tree Work Necessary for Development	RPA (m ²)	RPA (m)
			N	S	E	W							
TG2 Oak <i>Quercus</i> sp.	Up to 17	Max. 1050	38		20		3 4 West	M	40 + Good Fair	Trees within a field. Northern most tree has significant die back with dead wood typical of species. Damaged bark at 1m north side. Lean 45° east from 2m, no evidence of root plate movement. Middle tree has deadwood and water sprouts on main stem. Southern most tree has a girdled root on north side. Minor dead wood.	B2 Retain and protect Remove deadwood	499	12.6

Key to Terms

- Identification numbers have been used and correspond to the site plan shown at **Appendix 1**.
- Vegetation type has been categorized as one of the following: Tree (T), Hedge (H), Shrub (S), Group (G), Stump (ST)
- Species are listed by common and botanical name where appropriate.
- Where possible, measurements have been made in accordance with the conventions detailed below. Where this was not possible, due to site conditions or the vegetation being in third party ownership, dimensions have been estimated. * Indicates estimated measurement.
- Height has been recorded to the nearest half metre.
- Stem diameter has been measured at 1.5m and recorded in millimetres, except where forking or swelling has meant that this is not possible, stem diameter has then been recorded at the narrowest point below these features. Multi-stemmed trees have had individual stems measured at 1.5m. Where this was not possible the actual height where the diameter was measured is recorded. G.L. = Ground Level.
- Crown spread has been recorded to the nearest half metre. Rounded up for dimensions up to 10m and the nearest whole metre for dimensions over 10m.
- Age class has been recorded as follows:

Y	Young recently planted or establishing tree that could be transplanted without specialist equipment, i.e. up to 12-14cms-stem girth.
S/M	Semi mature. An established tree but one that has not reached its potential ultimate height and has significant growth potential.
E/M	Early mature. A tree reaching its ultimate potential height, whose growth rate is slowing down but will increase in stem diameter and crown spread, and has a safe life expectancy.
M	Mature. A mature specimen with limited potential for any significant increase in size but with a reasonable safe life expectancy.
O/M	Over mature. A senescent or moribund specimen with a limited safe life expectancy. Possibly also containing significant structural defects with attendant safety and/or duty of care implications.
- Physiological Condition has been recorded as Good, Fair or Poor.
- Recommendations for tree management have been based on current Arboricultural Best Practice as set out by the Arboricultural profession and all relevant publications.

5.0 TREE QUALITY ASSESSMENT

- 5.1 The trees have been categorized according to BS5837: 2012 as a guide to their condition and value in terms of visual amenity.
- 5.2 The trees are coloured on the plan attached at **Appendix 1** and the colours are explained in the key of the plan.

6.0 ROOT PROTECTION AREAS

- 6.1 In accordance with BS5837: 2012, the root protection area (RPA) of the trees has been calculated and shown in the following table and on the plan attached at **Appendix 2**.

Table 2 Root Protection Area

Tree No.	RPA in m ²	Recommended radial distances for RPAs (in metres from the centre of the tree to protective fencing)
T1	499	12.6
T2	547	13.2
T3	14	2.2
TG1	92	5.4
TG2	499	12.6

7.0 LEGAL CONSTRAINTS

- 7.1 Eastleigh Borough Council verbally confirmed there are no trees on site covered by a Tree Preservation Order or that the site falls within a Conservation Area. However, this should be confirmed in writing prior to undertaking any recommendations contained within this report.

8.0 ARBORICULTURAL IMPLICATIONS ASSESSMENT

8.1 Description of Proposed Development

It is proposed to seek planning permission conversion to convert the four barns to residential properties. In addition it is proposed to remove the hay barn (F) establish five new residential properties.

8.2 Drawings Used

A topographical plan was provided at the time of survey. This was then used to design the proposed layout on drawing number 991-D-XXX scale 1:250 @ A1. This has been used to prepare the Tree Quality Assessment Plan **Appendix 1**, the Root Protection Area Plan **Appendix 2** and the Tree Protection Plan found at **Appendix 3**.

8.3 Direct Loss of Trees

T1 Oak is to be removed given its physical condition, a replacement tree will be established. T2 Oak will have a minor crown raise to 3.5m. Dead wood removal from the Oaks within TG2 is also required. An aerial inspection should be carried out at this time.

8.4 Position of Trees in Relation to Proposed Development

It is not considered that the proposal will increase future pressure to fell any of the trees retained on the site.

8.5 Protective Barriers and Ground Protection

Protective Barriers

Protective barriers will be established prior to any construction taking place. The location of the barriers is shown on the Tree Protection Plan at **Appendix 3**.

Protective barriers in accordance with Figure 2 of BS 5837: 2012 (**Appendix 4**) should be erected around the trees to be retained. The fencing is to be supported with an appropriate stabilizing system (**Appendix 5**). Where possible, the positions of these fences should be based on a distance equivalent to the radius of each tree's RPA. All site personnel shall be made aware of the importance of root protection areas and shall ensure that they are properly maintained at all times. Once established the fencing will define the boundary of the Construction Exclusion Zone (CEZ).

Once erected all weather signage should be displayed stating 'Construction Exclusion Zone'.

No development works shall commence within the CEZ until written confirmation has been obtained from the Local Planning Authority. The project Arboriculturalist shall supervise all work within the RPAs.

8.6 Changes in Ground Surface within RPAs

Establishment of Lawns within the RPAs of T2 Oak and TG2 Oaks

There are no proposed significant changes in the ground surface for any retained tree with the exception of the establishment of the lawn for Barn B. In these areas the existing hard standing will be removed outwards from the tree trunk under arboricultural supervision.

The lawn will then be established in a rolled out manner that is from the furthest point from the tree towards its stem. The topsoil will be raked out by hand with the operatives working from load spreading boards. The turf will then be established from the trees stem outward leaving 1m clear around the stem. This will then be mulched.

8.7 Changes in Ground Level within the RPA

There are no proposed changes in ground level within the RPAs of any of the retained trees.

8.8 Foundations

No new foundations will breach any of the RPAs of the retained trees.

8.9 Services

No overhead services are to be installed.

At the time of writing no details on underground services have been supplied. It is not considered that any of these will need to breach the RPA's of any retained tree. If this is the case a plan showing the proposed service runs will be supplied along with the methodology for their installation.

8.10 Access for Contractors and Storage of Materials.

There is ample space on the site outside of the RPAs of the trees for contractor parking and storage of materials.

9.0 CONCLUSIONS

- 9.1 The trees on the site are predominately of a moderate quality providing a screening/softening role.
- 9.2 The remedial work recommended will help reduce future pressure to fell.
- 9.3 The establishment of the protective barriers and ground protection should be supervised by the project Arboriculturalist and confirmation of adherence with the Arboricultural Method Statement and Tree Protection Plan should be made to the Local Authority Tree Officer before any development starts.
- 9.3 Supervised operations within the RPAs of the retained trees will ensure minimal disruption within these areas.
- 9.4 Given these conclusions the following section 'Arboricultural Method Statement' details the recommendations/methodology for the construction of the proposed works in terms of the effect on trees on the site.

Details within this AIA are considered correct at the time of writing but modifications may need to be made as more information becomes available.

Important Notes

The comments made with regard to the health and stability of the trees within this report were correct at the time of inspection. It should be recognized that trees are dynamic structures that can never be completely predictable and may become unstable or partially unstable even in average weather conditions. Changes can occur not only to environmental triggers but also in response to biological or mechanical events.

Inspection Caveats

The inspection was carried out from ground level. Binoculars were used to observe features higher in the canopies.

Foliage, extension growth and/or bud proliferation were assessed visually.

No soil or tissue samples were taken during this inspection.

No invasive diagnostic equipment was used to detect decay.

A nylon hammer was used to test for possible decay and dead or loose bark around the lower stems and bases of the trees.

Ivy has been removed during the inspection process only where reasonable and practicable. Where this has not been possible it has been noted as a recommendation to be removed to allow detailed re-inspection.

No tree is ever absolutely safe due to the unpredictable laws and forces of nature.

ARBORICULTURAL METHOD STATEMENT**1.0 CONTACT DETAILS**

Architect	Stephen Hurrell	Hurrell Architecture 4 Sun Hill Crescent, Alresford, Hampshire, SO24 9NJ 01962 73676 mail@hurrellarchitecture.co.uk
Arboricultural Consultant	Sarah Johnston	Johnston Tree Consultancy 16 Manor Close, Wickham, Hampshire, PO17 5BZ 07814 403146 johnstontreeconsultancy@gmail.com
Local Authority Case Officer	Unknown at present	Planning Department Eastleigh Borough Council, Eastleigh House, Upper Market Street, Eastleigh, SO50 9YN 023 8068 8000 CustomerServiceCentre@eastleigh.gov.uk
Local Authority Tree Officer	Unknown at present	Planning Department Eastleigh Borough Council, Eastleigh House, Upper Market Street, Eastleigh, SO50 9YN 023 8068 8000 CustomerServiceCentre@eastleigh.gov.uk

2.0 INTRODUCTION

- 2.1 This Arboricultural Method Statement (AMS) has been produced in line with BS 5837 2012: Trees in relation to design, demolition and construction-Recommendations to aid the successful retention of trees on and adjacent to the proposed development at Mortimer's Farm, Mortimers Lane, Fair Oak, Hampshire. No development shall take place on the site until this document has been submitted to and approved in writing by Eastleigh Borough Council.
- 2.2 This document sets out the methodology for all proposed works that affect trees on and adjacent to the site. Compliance with this method statement will be a requirement of all relevant contracts associated with the development proposals. Copies of this document will be available on site for inspection.
- 2.3 For details of trees to be retained and location and types of special protection methods, reference should be made to the Tree Protection Plan (TPP). A copy of which should be displayed prominently on site.

3.0 PHASING OF DEVELOPMENT

3.1 Phase 1 – Pre Development Phase

Pre-Commencement Site Meeting

This is to take place with the project arboriculturalist, local authority tree officer and developer present to ensure the Arboricultural Method Statement is understood and agreed to prior to any development taking place.

Tree Work

Tree work will be carried out prior to construction taking place.

Tree Number	Work required
T1 Oak	Remove
T2 Oak	Crown raise to 3.5m removing adventitious growth only
TG2 Oak	Remove deadwood

Protective Barriers

Tree protection measures to be installed under the supervision of the retained Arboriculturalist for all the trees.

The protective barriers erected will be in accordance with Figures 2 and 3 of BS 5837:2012 (**Appendix 4 and 5**) and will form the boundary of the construction exclusion zone (CEZ). Where feasible, the positions of the fencing will be based on a distance equivalent to the radius of each tree's RPA. Once erected all weather signage should be displayed stating 'Tree Protection Area Keep Out'.

Area for Mixing Materials and Storage

There is adequate space for the storage of materials and equipment outside of the RPA's of any retained tree.

3.2 Phase 2 – Construction Phase

Change of Surface within the RPA of T2 Oak and TG2 Oaks

Removal of existing hard standing to be supervised using hand tools only working away from the centre of the tree. The top soil is to be raked out towards the tree with operatives working from load spreading boards. A gap of 1m will be left around the tree stem. Turf will then be laid working away from the stem with operatives working from load spreading boards. The area around the tree stem will then be mulched.

Where replacement hard surfacing is to be established this will also be undertaken under arboricultural supervision.

Protective Barriers

Once established the protective barriers are not to be moved without written consent from Eastleigh Borough Council.

4.0 **GENERAL ARBORICULTURAL CONSIDERATIONS**

- 4.1 Protective barriers must be regarded as sacrosanct, and must only be moved under direct supervision of the LPA or named Arboriculturalist to enable the undertaking of works within the RPAs of trees, as set out in this AMS, and approved in writing by the LPA. It is of paramount importance the fencing is repositioned correctly after any agreed operations.

- 4.2 No materials, chemicals, machinery or vehicles must be stored within the RPAs as defined on the TPP and identified on site by protective fencing and aboveground root protection.
- 4.3 Ground protection must not be lifted or removed without prior consultation with the LPA or named Arboriculturalist.
- 4.4 Damage caused to protective fencing or ground protection must be reported to the site supervisor and the named Arboriculturalist to ensure appropriate repair.
- 4.5 Any damage to retained trees must be reported without delay to the site supervisor, the LPA and the named Arboriculturalist so appropriate remedial work can take place without delay.
- 4.6 No materials that are likely to have an adverse effect on tree health such as oil, bitumen or cement will be stored or discharged within 5 metres of the trunk of the retained trees or any other trees on the site.
- 4.7 No fires will be lit on site.
- 4.8 Notice boards, telephone cables or any other signage or services are not to be attached to any part of the retained trees.

5.0 SUPERVISION AND MONITORING

- 5.1 The project Arboriculturalist shall be responsible for monitoring/supervising the following works.
 - Pre-commencement site meeting
 - Establishment of protective barriers and ground protection
 - Removal of hard standing within RPA of T2 Oak and TG2 Oak.
- 5.2 The project Arboricultural Consultant will be responsible for periodical monitoring and will inspect the protective fencing to ensure the CEZ is intact and monitor any works necessary within the exclusion zone. A record of site visits will be maintained for inspection on site and copies forwarded to the agent and planning authority when requested.

Please note this AMS is not a contract. The retention and services of a project Arboriculturist for supervision and monitoring must be agreed prior to commencement of construction operations



CREDENTIALS OF THE AUTHOR

Sarah Johnston M. Arbor. A., B.Sc. Arboriculture has worked in the Arboricultural profession for thirteen years. Her experience has been gained from undertaking practical tree work as well as working as an Arboricultural Surveyor and Tree Officer for Eastleigh and Havant Borough Councils respectively. In addition Sarah worked as a consultant for Marishal Thompson for two years from 2005 when she became self-employed. Sarah is a Professional Member of the Arboricultural Association and holds Professional Indemnity Insurance.