A report on tree condition

following an Active Assessment
in line with your Valid Tree Risk-Benefit Policy

Revision	Date	Who?	Comment

Survey Date: 29/04/2025
Report Date: 30/04/2025
Site: 8 Underhill Road, Sunderland, SR6 7RS
Client: Ashley O'Carroll
Job Ref: 3962

Survey and report by Simon Forster BSc MArborA DipArb L4 (ABC)
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1 Introduction

1.1 Those responsible for trees, tree managers, have a duty to inspect and maintain trees in a manner that is reasonable & proportionate to the low risk from trees, the benefits of trees, and the tree manager's own health and safety obligations[1]. In reality, '*it is perfectly normal for trees to occasionally break without anyone or anything being to blame. The breakage is the natural price the tree must pay for achieving an energy-saving, lightweight structure*'[2].

1.2 The risk management; sometimes called safety management; of trees, is a matter of limiting the risk of harm from tree failure, while maintaining the benefits conferred by the tree being present. This is accomplished through inspection and remedial maintenance.

1.3 Our client has adopted a VALID approach to tree safety already; in that, during what VALID[3] refers to as Passive Assessment, 'the client', Ashley O'Carroll, has identified a potential issue with a tree, within the boundary of 'the site', 8 Underhill Road, Sunderland, SR6 7RS (Figure 1). We've provided a customised copy of the VALID Homeowner Strategy to support them in this approach; see Appendix 3.

1.4 I, Simon Forster, have been instructed by Ashley O'Carroll, 'the client', to carry out a Detailed Assessment of the trees to the front of the property, and, to report my findings along with any reasonable & proportionate actions that I recommend be implemented. I have done this in line with VALID; and recommend that VALID be adopted by the homeowner.

Figure 1 – Survey area red line boundary



[1] Common sense risk management of trees (FCMS024), 2023, National Tree Safety Group
[2] Professional Tree Inspection Workbook – Version 4, 2023, Lantra Awards.
[3] VALID Tree Risk-Benefit Management & Assessment, VALID

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2 Methodology

2.1 Active Assessment is when we're looking for risks that might not be Acceptable or Tolerable. It's also triggered when Passive Assessment has picked up a tree that needs a closer look. Active Assessment has 3 levels to it that increase in depth of evaluation. The 3 levels are Basic > Detailed > Advanced.

2.2 Risk ratings have limitations that depend on the level of assessment at which they're made. For instance, when we carry out Active Assessment at a Basic level. If there are no Obvious Tree Risk Features, the risk is Acceptable at that level of assessment. A Detailed or Advanced Assessment is a more thorough evaluation than a Basic Assessment and should be carried out by a qualified and competent person. They assessor might find features that weren't apparent at a Basic level, and the risk could be higher. However, carrying out a higher level of assessment, with the additional costs, when there's no obvious feature to trigger it isn't reasonable, proportionate, or reasonably practicable.

2.3 At a Basic level of assessment, we're looking for trees with obvious features where the risk might not be Acceptable or Tolerable. We're also keeping an eye out for features that might increase the likelihood of failure. We can evaluate the significance of these features with VALID's Tree Risk App and will carry out a Detailed Assessment when it's necessary. Rarely, we may come across emergency work, and we'll let you know about this as soon as we can.

2.4 Where the client has raised an alert from Passive Assessment. We'll decide whether the tree needs a closer look at this Basic level of assessment.

2.5 We'll assess trees from easily accessible ground, by foot, bike, or in a vehicle with a drive-by, and agree which one with you beforehand. In this case the assessment was carried out by foot.

2.6 If there are any trees, we need to get a closer look at, but can't because of climbing plants, undergrowth, hedgerows, boundaries, basal growth, or because the ground is too difficult. We'll let you know.

2.7 Unless a tree has a feature to trigger carrying out a Detailed Assessment. The risk is Acceptable at this Basic level of assessment.

2.8 We'll carry out a Detailed Assessment out on trees that we've picked up during a Basic Assessment as needing a closer look. Or where you've asked for a Detailed Assessment on a tree.

2.9 We carry out Detailed Assessments with VALID's Tree Risk App and do them from ground level.

2.10 During a Detailed Assessment a tree is visually examined from the bottom up with the additional aid of an acoustic-sounding hammer and probe, from root plate to buttress, from main stem to primary and secondary branches, and from inner crown to outer canopy. This assessment method also considers surrounding influences, both biotic (living) & abiotic (physical), and their influence on the tree; for example, companion shelter - a building

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protecting a tree from the wind. No invasive decay instruments are used during a Detailed Assessment.

2.11 The Tree Risk App prints an easy to understand one side PDF report. The report includes the risk rating. Risk review year. Risk reduction work (if necessary). And any general management advice that will help you.

2.12 If we need more information about the likelihood of failure, we can carry out an Advanced Assessment. Often, we do this because you have a valuable tree which has extensive decay. The tree may have significant strength loss, and we want to find out whether the tree is strong enough. Or an aerial inspection is necessary to look at the upper stem and branches. When a tree needs an Advanced Assessment, we'll let you know what options you have. If costs are substantial, we can help you decide whether the tree has enough value and future benefits to justify the investment.

2.13 Using a system like VALID moves the management of tree safety away from labelling trees as either ‘safe’ or ‘unsafe’; removes the need for definitive statements of tree safety from either tree surveyors or tree managers; and provides a clearer understanding of the true risk of harm from a tree.

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3 Limitations

3.1 Location of trees illustrated in this report are approximate, derived from geo-reference data, ordnance survey mapping and aerial photography. The tree locations shown on the plan are sufficiently accurate to assess the risk of harm and readily identify trees requiring works.

3.2 The findings of this report are only valid for 12 months from the date of the tree inspection and whilst every effort is made to ensure an accurate assessment of tree condition is made during an inspection no responsibility can be taken for resultant damage or injury occurred by a falling tree. The survey only gives a snapshot of what is visible, not obscured, or inaccessible on the day of the survey

3.3 Legal constraints may limit the work that can be undertaken on-site, and the methods used. These may include, but are not limited to, tree preservation orders, conservation areas, the presence of wildlife and the requirements for a felling license.

3.4 It is my understanding these trees are protected by South Tyneside Council TPO 315

3.5 It is my understanding your site is within the Cleadon Village conservation area.

3.6 Requirements for a felling license under the Forestry Act (1967) may apply to this site depending on the designation of the land where the trees are located. The Forestry Commission guidance document, '*Tree felling: getting permission*', tells you if you'll need to get permission to fell trees. It is my understanding that trees standing or growing in a garden, as yours are, are exempt from the requirement for a felling license.

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4 Findings

4.1 I, Simon Forster, holder of the ABC Level 4 Diploma in Arboriculture and the LANTRA Professional Tree Inspection qualification, conducted this Active Assessment on 29/04/2025.

4.2 The weather on the day of the inspection was warm and dry with a slight breeze showing movement in the crowns of the trees at this site.

4.3 The site is a residential dwelling house with large driveway area to the front. A road and footpath pass externally on the east boundary.

4.4 Four trees were assessed by Detailed Assessment. These can be found in Appendix 2 (detailed assessments). The location of these trees is marked in Appendix 1 (site plan).

4.5 My recommendations are set out in section 5.

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5 Recommendations

5.1 Medium Priority

5.1.1 You should, as soon as practically possible after completing any high priority works (of which there are none recommended), have a suitably qualified and competent person carry out the following work.

Tree(s)	Works
4T	Remove tree & replant

5.2 Low Priority

5.2.1 You should, if sufficient budget is available, have a suitably qualified and competent person carry out the following work.

Tree(s)	Works
3T	Remove two branches which cross in two places over road and removed deadwood while doing this work.
All	Maintain a 10cm layer of mulch around the base of all trees to improve soil conditions.
All	Reinspect in 2027; including aerial inspection of 1T.

5.3 It is my opinion that there will be no significant long-term adverse impact on the amenity/habitat/heritage value of the immediate or wider landscape provided a suitable tree is replanted near to where 4T is removed.

5.4 I recommend the client formally adopts the VALID Homeowner strategy found in Appendix 3.

5.5 All tree works recommended should be carried out in accordance with *British Standard BS3998:2010 Tree Work – Recommendations*, unless explicitly state otherwise.

5.6 Prior to instruction of any works consideration should be given for protected wildlife, which may involve inspection and written records or reports, to prevent damage to wildlife and ensure compliance with the Wildlife and Countryside Act 1981 and to protect species such as Bats that are protected under The Conservation of Habitats and Species (Amendment) (EU Exit) Regulations 2019.

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6 Appendix 1 – Site Plan



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7 Appendix 2 – Detailed Assessments

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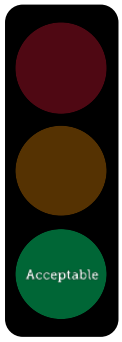
Sycamore Maple (1T)



Summary

Highest Risk	**Acceptable**
Risk Reduction	N/A
Tree Management	Aerial inspection in 2027 to confirm extent of decay.
Review Year	**2027**
Date Assessed	2025-04-29 11:39 am
Assessed By	Simon Forster
Phone Number	01914326167
Email	hello@thetreefellane.co.uk

Risk



Tree Details and Location



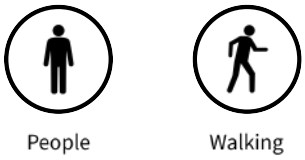
Species	Height (m)	Stem Ø (cm)	Crown Ø (m)
Sycamore Maple Acer pseudoplatanus	12	68	7

Cleadon
Sunderland
SR6 7RS

Risk Inputs

Likelihood of Occupation





O

4
Low

Consequences

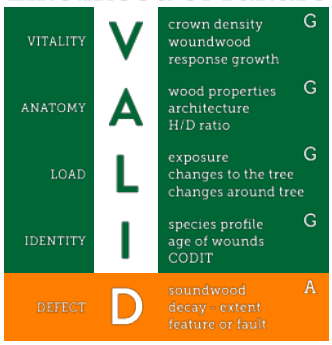




C

3
Moderate

Likelihood of Failure



Good vitality.

Historically topped on house side; so smaller in height that it once was.

Adjacent confiner has been topped historically exposing crown to a northern wind for a period of time.

Topping wound appears to be decaying top of stem. Plant growth within cavity.

Several small diameter dead branches. Topped main stem with cavity at the summit; progression of extent of decay into stem is unknown at this time.

F

5
Very Low

Notes

The highest risk is small dead branches.

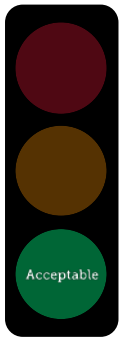
Sycamore Maple (2T)



Summary

Highest Risk	**Acceptable**
Risk Reduction	N/A
Tree Management	Mulch around base of tree to improve soil conditions.
Review Year	**2057**
Date Assessed	2025-04-29 12:02 pm
Assessed By	Simon Forster
Phone Number	01914326167
Email	hello@thetreefellane.co.uk

Risk



Tree Details and Location



Species	Height (m)	Stem Ø (cm)	Crown Ø (m)
Sycamore Maple Acer pseudoplatanus	12	51	8

Cleadon
Sunderland
SR6 7RS

Risk Inputs

Likelihood of Occupation





People



Weather Affected

O

3 Moderate

Consequences





Tree



Stem



Branch

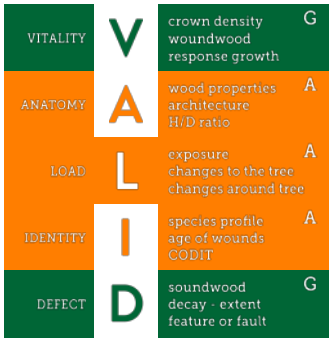


Deadwood

C

3 Moderate

Likelihood of Failure



Good vitality.

Long laterals extending over road and towards house entrance.

Extended laterals are becoming more exposed to wind.

Asymmetrical due to shading by adjacent 3T.

Very small deadwood over garden side of hedge.

F

4 Low

Notes

The highest risk is laterally branches breaking in high winds.

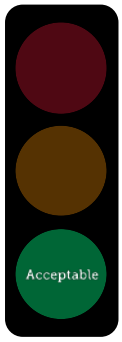
Wych Elm (3T)



Summary

Risk

Highest Risk	**Acceptable**
Risk Reduction	Remove pair of crossing branches over road.
Tree Management	Mulch around base of tree to improve soil conditions.
Review Year	**2027**
Date Assessed	2025-04-29 12:11 pm
Assessed By	Simon Forster
Phone Number	01914326167
Email	hello@thetreefellane.co.uk



Tree Details and Location



Species	Height (m)	Stem Ø (cm)	Crown Ø (m)
Wych Elm Ulmus glabra	15	78.5	8

Cleadon
Sunderland
SR6 7RS

Likelihood of Occupation



Risk Inputs



O

3 Moderate

Consequences

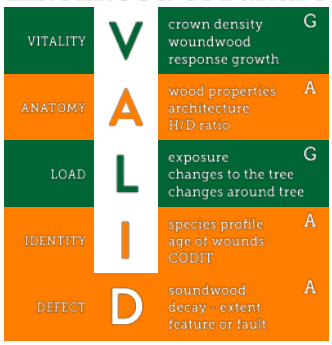




C

3 Moderate

Likelihood of Failure



Typical of species.

Limited buttress flare on northern aspect.

No apparent changes.

Several small dead internal canopy branches typical of species.

Two large branches cross; good growth. Two smaller branches cross over road; poor contact, likely failure.

F

3 Moderate

Notes

The highest risk is pair of branches crossing multiple places over road.

Summary

Risk

Laburnum (4T)



Highest Risk	**Not Tolerable**
Risk Reduction	Remove & replant with similar species.
Tree Management	
Review Year	**2027**
Date Assessed	2025-04-29 12:28 pm
Assessed By	Simon Forster
Phone Number	01914326167
Email	hello@thetreefellane.co.uk



Tree Details and Location



Species	Height (m)	Stem Ø (cm)	Crown Ø (m)
Laburnum Laburnum alpinum	5	-	2

Cleadon
Sunderland
SR6 7RS

Risk Inputs

Likelihood of Occupation





O

Consequences

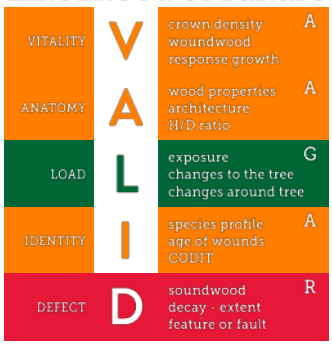




C

3 Moderate

Likelihood of Failure



Loss of bark and stem dieback. Good vitality of new growth and regeneration on lower main stem.

Leaning towards target. Decay on compression side and sound wood on tension side.

No recent changes.

Poor compartmentaliser and also old for species; typical branch and stem failure in this condition.

Decay throughout entire compression side of tree. Sound wood connecting ground to crown in columns.

F

2 High

Notes

The highest risk is whole tree failure onto private driveway entrance.

8 Appendix 3 – VALID Homeowner Strategy

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Mr O'Carroll

8 Underhill Road
Sunderland
SR6 7RS



Tree Risk-Benefit Management Strategy

Contact Arborist

Simon Forster
The Tree Fella
www.thetreefellane.co.uk
0191 432 6167

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1 Establishing the context

Trees give us many benefits we need

1 The more obvious benefits that trees give us are visual beauty in the landscape, wood, and the various crops they produce. Wildlife habitat, pollution filtering, and reducing weather and climate change effects are additional values. Trees also have important social value as part of our culture, history, or because they commemorate an important event. As if all these benefits aren't enough. There's an ever-expanding body of scientific evidence that shows trees are essential for our physical health, mental wellbeing, and quality of life.

The overall risk to us from trees and branches falling is extremely low

2 Compared to other everyday risks we readily accept, the overall risk to us from branches or trees falling is extremely low. Our annual risk of being killed or seriously injured is less than one in a million. That's so low, we're at greater risk driving on about a 400km/250mi round trip to visit friends for a weekend than from branches or trees falling over an entire year. Given the number of trees we live with, and how many millions of us pass them daily, being killed or injured by a tree is a rare event. A rare event that usually happens during severe weather.

We can't be an insurer of nature or eliminate the risk from trees

3 Of course, we can't be an insurer of nature. Trees are living structures that sometimes shed branches or fall during severe weather. Since we need the many benefits from trees, we have to accept we can't remove all of the risk. Leaves, bark, cones, nuts, fruits, and small diameter deadwood regularly fall from trees. This natural debris is an Acceptable or Tolerable risk.

1.1 Duty of care

Reasonable Proportionate Reasonably practicable

4 We have a duty of care to manage the risk from our trees. The duty also says we should be reasonable, proportionate, and reasonably practicable when managing the risk. That means there's a balance we need to strike between the many benefits trees provide, the risk, and the costs of managing the risk. By taking a balanced approach, we don't waste resources by reducing risk - and losing benefits - when the risk is already Acceptable or Tolerable.

We all have a responsibility to make reasonable decisions

5 We're all expected to act reasonably and responsibly. We can manage our exposure to the higher risk from tree failure that happens during severe weather by not going outside. If we go out during severe weather, we're choosing to accept some of the risk.

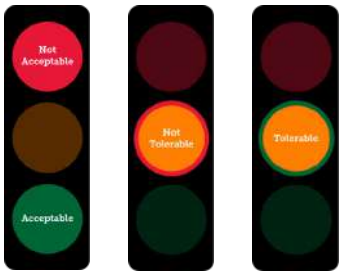
1.2 Risk tolerance

What's an Acceptable or Tolerable level of risk from our trees?

6 The Tolerability of Risk Framework (ToR) is an internationally recognised approach to making risk management decisions. It's used by duty holders where they manage a risk that's imposed on the public. ToR defines Broadly Acceptable and Unacceptable levels of risk. Between these levels is a region where the risk is Tolerable if it's 'as low as reasonably practicable' (ALARP). Put simply, ALARP means the risk is Tolerable if the costs of the risk reduction are much greater than the value of the risk reduction.

1.3 Risk objectives & Risk ratings

Risk ratings are as easy to understand as traffic lights



7 VALID has applied 'ISO 31000 - Risk Management' and the 'Tolerability of Risk Framework' (ToR) to tree risk-benefit management and assessment, which we've adopted. In ISO risk terms, our 'objectives' are to grow, maintain, and conserve trees because of the many benefits they give us we need. And, to manage the risk from tree failure to an Acceptable or Tolerable level. We're going to manage the risk from our trees with **Passive Assessment**. We have four easy-to-understand traffic light coloured risk ratings to show how we'll manage the risk.

Red	**Not Acceptable** risks will be reduced to an Acceptable level
Amber	**Not Tolerable** risks will be reduced to an Acceptable level, but with a lower priority than red Not Acceptable risks
Amber	**Tolerable** risks will not be reduced, but may require an increased frequency of assessment than green Acceptable risks
Green	**Acceptable** risks will not be reduced

2 When might a tree be dangerous?

Trees with the highest risk are the easiest to spot

Be watchful after storms

8 When a tree has a risk that might not be Acceptable or Tolerable, it'll usually have an obvious tree risk feature you can't help but notice. Passive Assessment is simply picking up on these features as you go about your day-to-day routine. If you see anything like these features, get in touch with us.

2.1 Root failure

Storms can break tree roots without blowing them over

Signs to look out for are

Change in angle of the trunk
Large cracks in the soil
Hump in the ground on one side

9




2.2 Hanging branches

Don't forget to look up

Branches can break during storms and still hang on

Sometimes they can get stuck up there for quite a while

10





2.3 A crack or split into the wood, beyond the bark

When trees bend and twist in storms the wood can split and crack

Vertical cracks in the bark are just the tree growing well there's no need to worry

11





2.4 Decline & death

To stay healthy and strong trees need 'solar panel' leaves to make food

When trees suffer they often have much less leaf cover and many dead branches

Standing dead trees have great habitat benefits but need checking

12





2.5 Decay fungi fruiting bodies

To decay fungi these 'fruits' are like apples to an apple tree

Decay fungi and trees mostly live happily together creating essential habitat for wildlife

Fungi can sometimes 'eat' too much wood and weaken the tree

13





Photographs
Jake Miesbauer, Michael Richardson, Roy Finch, Mark Hartley, Rick Milson, Andrew Benson, David Abrahams
Felicity Cloake & Wilf, David Humphries, Jack Prynn, Moreton Arboretum, Josh Behounek, Jan Allen

3 Simpler • Clearer • Smarter

The Strategy at a glance



14 Whether you manage or assess tree risk, we're here to help make your life less complicated and more effective.

15 From Strategy to App, we've got all your bases covered with the first complete tree risk-benefit management system. By taking out bafflegab (vague and ambiguous words) and numberwang (questionable maths that you can easily get wrong) from tree risk, we've made it...

16 "***Uncomplicated...intuitive...simpler...clearer...smarter***"

17 This is what Duty Holders, Arborists, and other team members who we've trained as Basic Validators are all saying. They're some words you'll likely use to describe how you feel after you've validated your approach to tree risk.

3.1 Tree risk-benefit management

Reasonable
Proportionate
Reasonably practicable



18 Whether you're a Government Agency, Landowner, or Homeowner you have a duty of care to manage the risk from your trees falling or dropping branches. To fulfil your duty, you should be reasonable, proportionate, and reasonably practicable about managing the risk to an Acceptable or Tolerable level.

19 VALID's got your back here with our full range of ISO 31000 compliant and common sense **Tree Risk-Benefit Management Strategies**. As part of our not-for-profit goals, we've released all the strategies under a creative commons license. That means they're *free* and open to *everyone*. **Validators** can help you customise your strategy. Or, they have an abbreviated *Validator Strategy* that covers you and them.

3.2 Tree risk-benefit assessment

VALID has been stress-tested to breaking point



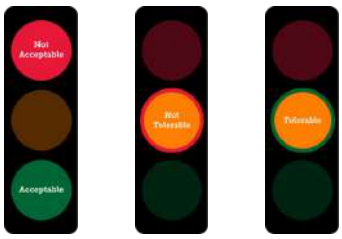
20 Risk-benefit assessments are carried out under the protective umbrella of our Tree Risk-Benefit Management Strategy. The Strategy does more than 95% of your assessments for you. When you need to carry out a *Detailed Assessment*, you'll use our super smart and intuitive **Tree Risk App**.

21 We've built the engine of the App with a Professor of Natural Hazards & Risk Science. The Professor's an internationally distinguished expert in this field. He's test-driven the model to breaking point:

> *"We have stress-tested VALID and didn't find any gross, critical sensitivities. In short, the mathematical basis of your approach is sufficiently robust and dependable for any practical purpose."*
>
> Willy Aspinall
> Cabot Professor in Natural Hazards & Risk Science
> University of Bristol

3.3 Tree risk ratings

Risk ratings are as easy to understand as traffic lights



22 Yes, it really is that clear and easy to understand. There's no confusion about what vague and ambiguous words or complicated numbers mean. We have four easy-to-understand traffic light coloured risk ratings.

Red	Not Acceptable risks will be reduced to an Acceptable level
Amber	Not Tolerable risks will be reduced to an Acceptable level, but with a lower priority than red Not Acceptable risks
Amber	Tolerable risks will not be reduced but may require an increased frequency of assessment than green Acceptable risks
Green	Acceptable risks will not be reduced

3.4 Tree risk-benefit management advice & training

Visit our Training page
Or get in touch for help

23 We work with Duty Holders to help them manage the risk and benefits from their trees. We also train Arborists to become **Validators**. And personnel who spend a lot of time outside, who aren't Arborists, to be **Basic Validators**.

9 Appendix 4 – Information on Author

9.1 I, Simon Forster, have over eight years of experience working within the Arboricultural industry. I have worked as a climbing arborist for many of these years and have a detailed knowledge of the practical profession of climbing arborist. I hold a Level 4 Diploma in Arboriculture and I am a professional member of the Arboriculture Association (PR9022). I have a keen interest in all areas of arboriculture and keep up to date with research and developments, tracking CPD as part of my Arboriculture Association membership.

9.2 My qualifications include.

- Upper Second-class BSc Honours Degree
- ABC Level 4 Diploma in Arboriculture
- PTI - Professional Tree Inspection (LANTRA awards)
- Quantified Tree Risk Assessment (QTRA) – Mike Ellison
- VALID Tree Risk-Benefit Management – David Evans
- Practical Arboriculture Qualifications (NPTC)

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