



A report on tree condition including management work recommendations

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Site: 1 Moor Court, Sunderland, SR6 7JU
Client: Eve McKenzie
Job Ref: 4044

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

Website: www.thetreefellane.co.uk
Email: simon@thetreefellane.co.uk
Phone: 01914326167
Mobile: 07896703068

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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 obligations¹. 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 Although it may seem counterintuitive, the condition of a tree should not be the first consideration. Instead, a tree manager should first consider the land usage on which a tree stands, which in turn will inform the process of assessing the tree.³
- 1.4 I, Simon Forster, have been instructed by Eve McKenzie, 'the client', to carry out a formal ground-based tree inspection & assessment of risk posed by trees located within the red line boundary of, 'the site', 1 Moor Court, Sunderland, SR6 7JU (Figure 1) with a diameter of 150mm or greater, at a stem height of 1.5m stem from ground level, and, to report my findings along with any reasonable & proportionate actions that I recommend be implemented.

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 [Quantified Tree Risk Assessment - A Non-Technical Summary](#), v5.2, QTRA

2 Methodology

- 2.1 At The Tree Fella, our professional tree inspections are carried out following an internationally & legally accepted method of Visual Tree Assessment, or VTA, first described in 1995⁴, and with very few revisions (2007⁵ & 2015⁶) since.
- 2.2 Trees are 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) and abiotic (physical), and their impact on the tree; for example, companion shelter—something that protects a tree from the wind. No invasive decay instruments are used during a VTA.
- 2.3 Measurements and inspection observations are recorded in a routine format, in Appendix 1. Where suitable trees may be grouped. Any trees of note, falling outside the group average conditions in terms of structure or physical characteristics, will be individually identified.
- 2.3.1 **Tree ID** - Trees are referenced sequentially, with an ID and a descriptive suffix. 'T' for an individual tree, 'N' for a neighbour owned tree, and 'G' for a group of trees, e.g. 1T, 2N, 3G.
- 2.3.2 **Species** – Common English names are used for simplicity alongside the respective Latin genus & species for clarity.
- 2.3.3 **Life Stage** – Trees are assigned one of 6 age classifications; Young (Y) – A tree established within the last 15 years; Semi-mature (SM) - A tree in the first third of its normal life expectancy for the species & with significant potential for future growth; Early-mature (EM) -A tree in the second third of its normal life expectancy for the species with some potential for future growth; Mature (M) - A tree in the latter third of its normal life expectancy for the species, typically having reached its ultimate size; Late mature (LM) - Beyond the normal life expectancy for the species; and Ancient (A) – an irreplaceable tree of noteworthy age, far beyond that of upper ages species population within the UK.
- 2.3.4 **Height** – An approximate height in meters, rounded up to the nearest 5, that can be used when considering tree failure distances (hence rounded up).
- 2.3.5 **DBH** – Diameter of main stem in millimetres at 1.5 metres from ground level, used to observe change over time. Where the tree is a multi-stem, this may not be recorded.
- 2.3.6 **Structural Observations** – Notable observations of the inspected tree's structural condition, paying particular attention to structural features associated with tree or branch failure, i.e. those linked with increased risk of harm, and decreased safety.

⁴ Mattheck, C & Breloer, H. (1995). The Body Language of Trees: A handbook of failure analysis

⁵ Mattheck, C. (2007). *Updated Field Guide for Visual Tree Assessment*.

⁶ Mattheck, C., Bethge, K., & Weber, K. (2015). The Body Language of Trees Encyclopedia of Visual Tree Assessment.

- 2.3.7 **Physiological Observations** – Trees are assigned one of 5 physiological classifications; N – Within normal range for the species & age; R – Reduced from the normal range for species and age; P – Poor; MD – Moribund, in terminal decline; and D – Dead.
- 2.4 Whilst VTA provides a means to generally identify trees with a higher likelihood of failure it does not allow us to identify arboricultural management priorities in a reasonable & proportional manner⁷. We have therefore adopted the use of the Quantified Tree Risk Assessment (QTRA) system⁸.
- 2.5 QTRA applies established and accepted risk management principles to tree safety management. Firstly, the targets (people & property) upon which trees could fail are assessed and quantified, thus enabling tree managers to determine whether to assess trees and to what degree of rigour a survey or inspection of the trees is required. Where necessary, the tree is then considered in terms of both size (potential impact) and probability of tree or branch failure. Values derived from the assessment of these three components (target, size and probability of failure) are combined to calculate the probability of significant harm occurring.
- 2.6 If you'd like to gain a greater depth of understanding of QTRA you can read the publicly accessible Practice Notes at <https://www.qtra.co.uk/practice-notes/>.
- 2.7 Using this system 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.
- 2.8 The land-use upon which trees could fail (Target) is assessed first. By valuing the Target first, the tree owner and the risk assessor can determine whether, and to what degree of rigour, a survey or inspection of the trees is required.
- 2.9 Where a Target of value exists, the likelihood of the target area being occupied at the exact time of failure is evaluated, along with the potential harm caused, or cost of damage. The tree, or tree part, is then evaluated in terms of its size and the probability of its failure within the coming year.
- 2.10 Values for Target, Size, and Probability of Failure are entered into a QTRA calculator which generates a traffic light colour-coded risk of harm. The tree owner can then compare the risk to commonly accepted advisory levels for risk tolerance. For example, a 1 in 1000 chance of harm is unacceptable, whilst a 1 in a million chance requires no action.
- 2.11 Risk Assessment factors are recorded in a routine format, in Appendix 1.
- 2.11.1 **Risk Assessment Of** - A description of the risk that has been identified as most likely and assessed, through a combination of the tree condition and target value. *Where no elevated risks are identified and the calculation is empty, the cell will display RISK <1/1M, CALCULATION NOT REQUIRED.*

⁷ Lonsdale, D. (2022). Principles Of Tree Hazard Assessment and Management

⁸ Ellison, M. (2005). Quantified Tree Risk Assessment Used in the Management of Amenity Trees

- 2.11.2 **Target type** - V = Vehicle on Highway; H = Human; P = Property; and N = None.
- 2.11.3 **MX targets** - Where target, on average over a year, is constantly occupied by more than one person or property, this is accounted for. A risk to 10 people, instead of being shown as 1/1,000 would be shown as 1(10T)/1,000 – ten times the standard loss.
- 2.11.4 **Target** – A value which considers the probability a target is occupied (e.g. a passing person), or the value of the property present, at the time of failure.
- 2.11.5 **Size** – A value that allows us to assess the consequence of a failure on the target.
- 2.11.6 **Probability of Failure** – A value for probability of failure (PoF), within the coming year, that allows us to assess the likelihood.
- 2.11.7 **Mass %** - Where the mass of a branch is reduced by degradation, a fraction of 1/2 or 1/4 may be introduced to reflect the reduction in risk.
- 2.11.8 **Risk of Harm** – An annualised risk of harm (RoH); a probability based on target, size and PoF.
- 2.12 The findings of the QTRA method quantify the risk of harm from tree failure in a way that enables tree managers to balance safety with tree value and operate to predetermined risk thresholds. In the event of a ‘tolerable’ or ‘acceptable’ risk being realised, they can demonstrate the risk has been managed reasonably & proportionately. Where an ‘unacceptable’ risk is present, a recommendation will be provided.

Figure 2 – QTRA Advisory Risk Thresholds

Thresholds	Description	Action
	Unacceptable Risks will not ordinarily be tolerated	Control the risk
1/1 000	Unacceptable (Where imposed on others) Risks will not ordinarily be tolerated	Control the risk Review the risk
	Tolerable (By agreement) Risks may be tolerated if those exposed to the risk accept it, or the tree has exceptional value	Control the risk unless there is broad stakeholder agreement to tolerate it, or the tree has exceptional value Review the risk
1/10 000	Tolerable (Where imposed on others) Risks are tolerable if ALARP	Assess costs and benefits of risk control Control the risk only where a significant benefit might be achieved at a reasonable costs Reviews the risk
1/1 000 000	Broadly Acceptable Risk is already ALARP	No action currently required Review the risk

- 2.13 **Recommendation** - Where a risk control is necessary, as shown in Table 2, remedial work or management options will be provided to reduce the risk to a level as low as reasonably practicable (ALARP). Other recommendations may be present that reflect good management practice, such as ivy removal.
- 2.14 **Priority** - Finally, a priority of works will be determined. The urgency of the work will depend primarily on the risk of harm.

Figure 3 - Description of priority codes

1 - Urgent	Immediate action is required because of the risk of imminent failure with the potential of serious injury/damage to persons or property. In such cases this will have been addressed, in part, before leaving site; the relevant authorities and landowner being notified, and a cordon put in place for example.
2 - Unacceptable	Recommendation for a risk of harm greater than 1/1,000 should be carried out at the earliest opportunity.
3 - Unacceptable or Tolerable by Agreement	Recommendation for a risk of harm greater than 1/10,000 should be carried out at the earliest opportunity after Code 2 works.
4 - Tolerable	The risk is less than 1/10,000 but significant benefit can be achieved at a reasonable cost, works should be carried out when budget permits.
5 - Maintenance	The risk is broadly acceptable but recommended general maintenance works could form part of a long-term management plan when budget permits and all other works have been completed.

3 Limitations

- 3.1 No independent verification of any of the documents or information supplied to the author by the client or 3rd parties has been carried out. Any information, documents or plans provided by the client have been taken at face value. It is the client's responsibility to identify, upon receipt of this report, if there is a boundary discrepancy where trees could have been missed during the inspection.
- 3.2 The level of detail of the tree inspection will vary depending on the target occupation and the size of the tree or group of trees. For example, zones of perceived high confluence (large trees in high target occupation areas) will be inspected in much greater detail than zones of perceived low confluence (small trees in low target occupation areas).
- 3.3 The location of trees illustrated in Appendix 2 (tree location plan) is approximate, derived from georeferenced 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 work.
- 3.4 Legal constraints may limit the work that can be undertaken on-site and the methods that can be 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.
- 3.5 It is my understanding that several trees inspected are covered by TPO 3 for Redhill, Whitburn. These are 1T (TPO3-T29), 7T (TPO3-T27) and 8T (TPO3-T28).
- 3.6 It is my understanding your site is within the Whitburn Village conservation area.
- 3.7 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.

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 tree condition survey on 30/06/2025.
- 4.2 The findings of this report are only valid for 12 months from the date of the tree inspection. 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 caused by a falling tree. The survey only gives a snapshot of what is visible, not obscured, or inaccessible on the day of the inspection.
- 4.3 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.
- 4.4 The site is a residential dwelling with a large garden front and back. All trees are within falling distance of properties or roads. The residents of these properties enter and exit the site via a driveway that passes under some of the trees. They park their cars near to the trees. A road and footpath pass externally at the south and east end of the site.
- 4.5 The tree data, recorded in line with my described methodology, can be found in Appendix 1.
- 4.6 It is my opinion that there are tolerable tree risks that may be mitigated if budget permits, and all other works have been completed.
- 4.7 My recommendations are set out in section 4.

5 Recommendations

- 5.1 I recommend 1T is reduced in height by 5m and reduced laterally on the southern face by 5m. Doing so will reduce the wind load and bring the centre of mass closer to the base of the tree. 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 when compared to the risk of losing the tree in its entirety. This tree should be reinspected within 18 months.
- 5.2 Before any work on 1T a suitable Owl box should be installed on 4T to provide an alternative nesting location for Tawny owl believed to be nesting in 1T.
- 5.3 I recommend 2T is removed and that a tree should be replanted within the property boundary to ensure there is no significant long-term adverse impact on the amenity/habitat/heritage value of the immediate or wider landscape.
- 5.4 I recommend deadwood over 1m in length is removed from the crowns of 7T and 8T.
- 5.5 I recommend 7T and 8T are treated for drought stress. The soil should be de-compacted using an airspade and a treatment of biochar applied. The ground should be watered routinely in hot weather and a drip line would be a good addition to ensure sufficient moisture is in the soil.
- 5.6 All tree works recommended should be carried out in accordance with *British Standard BS3998:2010 Tree Work – Recommendations*, unless explicitly state otherwise.
- 5.7 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.

6 Appendix 1 - Tree data

Tree ID	Species Common Name	Height (m)	Stem Diameter (mm)	Life Stage	Structural Observations	Physiological Observations	Risk Assessment of...	Target type	Mx targets	Target	Size	Probability of Failure	Mass %	Risk of Harm	Recommendations	Priority
1T	Ulmus laevis European white Elm	15	730	M	Fruiting bodies of Coprinellus sp. in cavity on tension buttress wound at ground level north face. Whilst not associated with causing tree failure this fungi being present and the buttresses either side are showing lots of new growth which would suggest compensating for a loss of strength in the buttress with the cavity. Second smaller buttress wound at ground level west face no evidence of decay, just dry wood. Cavity possible at 6m west aspect of stem where branch removed historically. Largest primary limb forms a secondary stem and secondary crown offset from main crown over driveway. Cracked union on primary stem 10m.The weight of remaining vertical growth leans towards neighbouring property. The failed section of the union is hung up in secondary stem's crown. Tree mainly leans towards owners' property with secondary crown extending 10m towards owners' property. Both lean and secondary crown are being held by the decayed tension side buttress. Tawny owl spotted in upper crown.	N	Primary limb failure onto garage and parked cars.	P	-	2	-	5	100	1/300K	Install Tawny Owl box in 4T and ensure any work to this tree is carried out outside of nesting season. Remove failed section of crown from secondary crown. Reduce crown height by 5m and reduce south face of crown laterally by 5m. Reinspect tree within 18 months.	4
2T	Laburnum anagyroides Laburnum	10	490	M	Main stem hollow at ground level south face. Main stem losing bark throughout. Crown deadwood throughout. Healthy growth on tips but dieback from inside progressing to outside. All symptoms of butt rot of laburnum associated with whole tree failure.	P	Whole tree failure onto garage.	P	-	2	-	5	100	1/300K	Remove tree.	4
3T	Acer pseudoplatanus Sycamore	15	515	EM	3 stems from 6m. Suppressed and asymmetrical. Small diameter deadwood over chicken run.	N	RISK <1/1M, CALCULATION NOT REQUIRED	-	-	-	-	7	100	<1/1M		
4T	Acer pseudoplatanus Sycamore	15	750	M	Tree leans towards property and front garden. Tension side of buttress partially hidden by fence and neighbour's garage. Open grown crown with a small number of small diameter deadwood branches.	N	RISK <1/1M, CALCULATION NOT REQUIRED	-	-	-	-	7	100	<1/1M		
5T	Prunus avium Wild Cherry	10	445	M	Multi stem from the 1.5m. Possibly a 'Kansan' cultivar. Exposed heartwood at cuts around main union but limited evidence of decay.	R	RISK <1/1M, CALCULATION NOT REQUIRED	-	-	-	-	7	100	<1/1M		
6T	Fagus sylvatica f. purpurea Copper Beech	15	655	EM	Open grown crown. Several occluding wounds from 1m to 3m. Crown breaks at 4m. No deadwood visible in crown.	N	RISK <1/1M, CALCULATION NOT REQUIRED	-	-	-	-	7	100	<1/1M		
7T	Acer pseudoplatanus Sycamore	15	575	EM	Large volume of deadwood over driveway. Looks to be drought stressed.	P	Branch failure onto parked car	P	-	2	-	5	100	1/300K	Decompaction of soil by use of airspade and application of biochar. Remove deadwood. Water regularly in hot weather. Reinspect within 18 months.	4
8T	Acer pseudoplatanus Sycamore	15	920	M	Large volume of deadwood over road and footpath. Pruning wounds on east face up to 6m. Looks to be drought stressed	P	Branch failure onto road	H	-	3	3	3	50	1/1M	Decompaction of soil by use of airspade and application of biochar. Remove deadwood. Water regularly in hot weather. Reinspect within 18 months.	4

7 Appendix 2 – Tree location plan



8 Appendix 3 – Information on Author

8.1 I, Simon Forster, have over seven 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.

8.2 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)

9 Appendix 4 – Bibliography

In this report I refer to several publications. Below is a relevant and considered list of publications that I have either referenced or read in relation to my tree survey work. I will likely have opened and considered sections from these books in relation to this report.

- British Standards 3998:2010 – Tree Work – Recommendations; British Standards Institution.
- British Standards 5837:2012 – Trees in relation to design, demolition, and construction; British Standards Institution.
- Lonsdale, D (1999) Principle of Tree Hazard Assessment and Management
- Mattheck, C (2007) Field Guide for Visual Tree Assessment
- The National Tree Safety Group (2011), Common sense risk management of trees
- Shigo, A.L (1991) Modern Arboriculture
- Slater, D (2022) Guidance Note 14 – Branch Junctions: A Classification System for Arborists
- Sterry, P (2007) Collins Complete British Trees London
- Strouts, R.G (2013, 3rd Edition) Diagnosis of Ill Health in Trees
- Weber, K & Mattheck, C (2003) Manual of wood decay
- Wessolly, L (2016) Manual of Tree Statics and Tree Inspection

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