

4. Inspecting and Caring for Trees



This sheet gives information and guidelines on trees, keeping them healthy and identifying potential issues, what you can do yourself and when an expert is needed.

TREE SURVEY

Site managers have a responsibility to keep the public safe in relation to trees. There may be concern about the risks and the expense associated with mature and veteran trees in particular, but there are things that can be done by volunteers as well as involving a professional with appropriate insurance.

By regular survey, changes in the health and/or condition of the tree will be identified and with the right care and conditions the tree can be appropriately retained and, in many cases, its life prolonged.

TREE SURVEY: carried out by volunteers

Take your site map produced in step 2 of the 5 steps (see sheet A1, The Five Steps). You will have marked individual trees on to this map and will know where they are in relation to buildings, paths and key monuments.

Now start to fill in additional detail about the trees. If there are several trees it may be helpful to put this information on a separate map.

Check for any wildlife known to use the trees. Are there roosting bats or nesting birds?

Surveying each tree

Find out which tree species are present:

- Look in an identification book or on a chart, such as the Field Studies Council fold-out tree chart.
- Check previous tree surveys.
- Ask your local tree warden or local authority tree officer.
- If you are not sure of the names of decorative specimen trees growing on your site then identify the family they belong to, e.g. 'decorative cherry with pink blossom'.

Describe any features of the tree and its location:

- Where does the tree grow? Is the ground shady, dry, sloping or grassy?
- Is the tree young, middle years, mature or a veteran?
- What shape does it have? Is it tall and narrow or short

and spreading? Has it been pollarded or coppiced in the past? (see sheet A6, Practical Management of Trees and Shrubs).

- Roughly how tall is the tree?

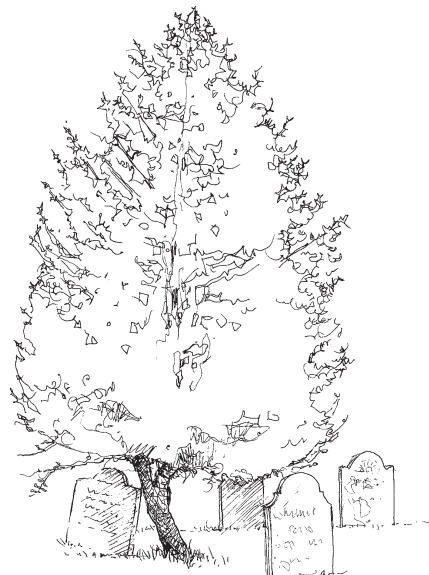
A simple way to estimate this is to ask someone to stand against the tree and then estimate how many times taller the tree is than them. Stand back so you can see the whole tree well.



Scots Pine

Estimating tree height using a stick

Take a straight stick which is the length of your arm from shoulder to hand. Hold this upright with your arm at a right angle to it. Walk away from the tree until the top of the stick lines up with the top of the tree. Push your stick into the ground at the point where you are standing and measure the distance from your stick to the tree trunk. Add the distance from your eye to the



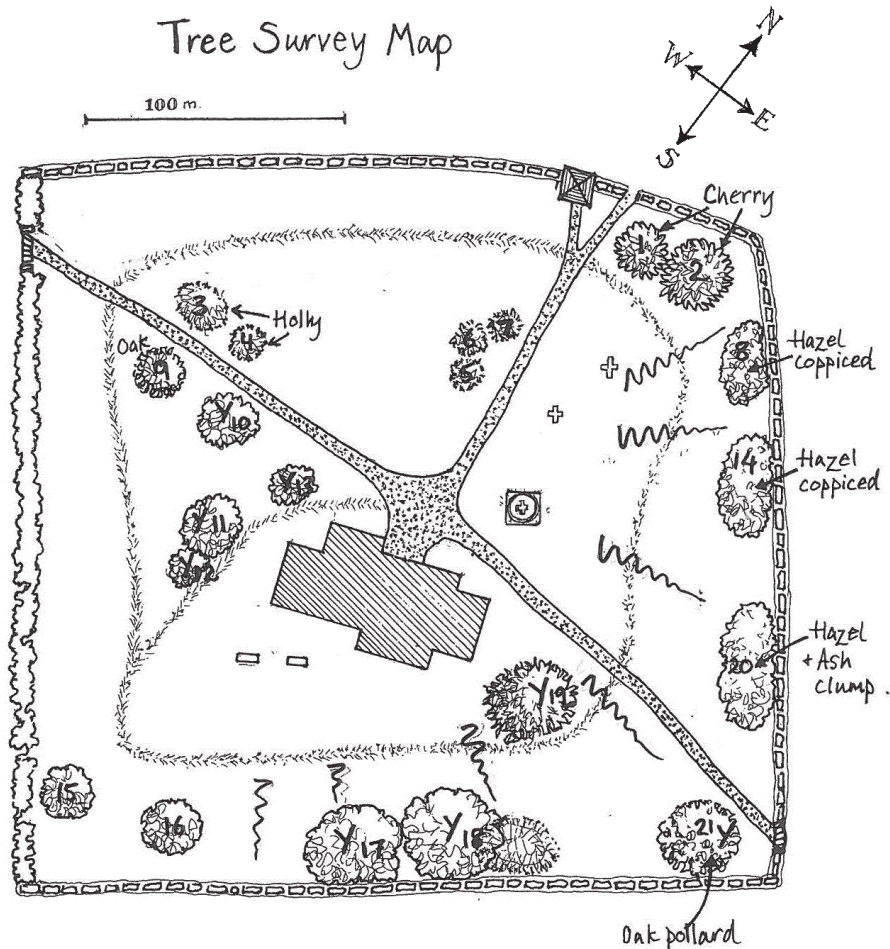
ground (this will be 3 or 4 inches less than your height) and this gives you the height of the tree!

- How wide is the tree canopy? Try and put the canopy width on to your map; draw a shape which represents the size of the canopy. This will help you plan management of the site as a whole.

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- Are there any features near to the tree which need consideration? Arborists call these 'targets' and they affect management and risk. Targets might be; paths, buildings, benches for example. When you have veteran or ancient trees, you may need to think about moving targets such as paths or benches away from the tree.

This first survey will give you a baseline tree plan



 Yew trees

 Sloping ground

 Top of slope
 Bottom of slope

TREE SURVEY TABLE

| Tree no. | Type | Estimated Height | Canopy width | Tree Features | Site Features/Targets | Action |
|----------|-------------|------------------|----------------------------------|------------------|-------------------------------|--------|
| 1. | Wild Cherry | 7m | 2.2m N, 1.5m S 2.3m E, 1.7m W | Mature + healthy | Path beneath overcrowded area | None |
| 2. | Wild Cherry | 1.5m | 0.2m N, 0.1m S 0.3m E, 0.1m W | Young sucker | | Remove |
| 3. | Holly | | | | | |
| 4. | | | | | | |
| 5. | | | | | | |

You may prefer to write text about each tree rather than a table. Find a system that suits you and stick to it.

Follow up this initial survey with:

Annual inspections carried out by volunteers

Inspect each tree in the summer or autumn. Alternating autumn and summer surveys gives an opportunity to better assess tree health. The surveyor does not need

specialist knowledge, qualifications or insurance as long as anything that causes concern is referred to a professional. If the survey is carried out by the same people each year then this gives continuity as you get to know your trees.

Take photos which can be included in your survey.

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Inspection checklist

Record whether:

- The tree has grown nearer to existing structures such as buildings, walls, monuments. If so, some pruning may be necessary.
- Saplings have established at the base of walls or monuments. These are best removed.
- Overhead cables are clear of any growth. This would need to be dealt with by a tree surgeon or the power company tree team.
- The tree shape has become untidy or noticeably one sided. Perhaps a limb has been lost during a storm. Pruning may be necessary or further advice sought.
- Has the ground level changed or soil under or near to the tree been disturbed by either digging down or mounding up?
- Does the tree have a stake or ties, in which case do they need loosening or removing?
- Has any tree work such as pruning taken place since the last survey?
- Does the trunk have holes, cavities or visible fungi at the base? These may require a professional survey.



Oak

The tree should then be checked from its leaves and upper branches down to the base looking at:

Leaves: are they unnaturally small, sparse or misshapen? Do they fall early and is the entire tree affected?

If a tree has small leaves, loses them early in the autumn and then fruits heavily it may be under stress from age, conditions or disease.

Branches: check for dead branches, lightning or storm damage, cavities or wounds. Are there hanging branches over paths or car parks? Oak and ash trees can become 'stag-headed' with age but remain healthy. (A stag-headed tree has dead branches near the top looking like a stag's antlers). Are there abrupt bends or rubbing branches? Look carefully at large forks or points where many branches sprout from one point. Large forks in the main stem need careful inspection.



Beech

Bark: check for fungi, cankers, calluses, and sap seepage, loose or damaged bark.

Roots: check for fungi, soil cracks, tree lean.

Ivy: if the tree has ivy growing on it has this increased in quantity since the last survey and is it within the crown of the tree? Is the ivy making it impossible to carry out a proper tree assessment?

These signs and symptoms do not mean that the tree is hazardous or diseased. However, they may indicate that a further inspection is required from a professional. Take photos of trees and features that concern you.

TREE SURVEY: when you need a professional

As well as annual inspections by volunteers it is prudent to have regular surveys by a qualified arborist or tree contractor with experience and indemnity insurance. Always ask for evidence of qualifications and insurance; a professional person will expect this. Seek advice from the [Arboricultural Association](#) or local authority when selecting an arborist or tree contractor.

In general these professional surveys can be done every other year or even every 5 years, but check the terms of your insurance.

Discuss the volunteer survey with the arborist and ask if there are any particular features you need to keep an eye on. The information from your annual surveys can then be used to keep the arborist informed about any changes that take place between visits, sending digital photos or copies of your survey sheets.

If your site is large, the site manager and arborist may divide the site into zones. These will reflect the amount of use by the public, the closeness of buildings and other potential targets. Ask your arborist whether zones are appropriate and if so, whether to carry out the volunteer survey more frequently in significant target areas, and less often in other zones.

Make sure that you follow up works identified in the professional survey in a timely manner and that a record is kept of all surveys and also of tree work carried out.

TREE MANAGEMENT WORK

Trees and the law

Prior to undertaking any work, it is essential to find out if a Tree Preservation Order (TPO) is in place or if the tree is in a Conservation Area. Should either be the case, seek permission from your local authority before beginning work. Potentially dangerous limbs and trees can, in theory, be removed without permission but the onus is on you to prove that there was a hazard prior to removal. Take digital photos and keep the felled section for any subsequent inspection. Penalties for breaching the legislations, inadvertently or not, can be severe. It is sensible to check, giving at least five days' notice of planned work. Digital photos can be helpful if work is urgent.

Local authority planning officers will advise you and may be helpful about tree work generally: choosing a tree contractor, managing public safety and planting replacements.

MANAGING CHURCHYARDS AND BURIAL GROUNDS

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The legal responsibility for trees will vary across different areas and different types of burial site. In a Church of England site for instance the **Parochial Church Council** is usually responsible for trees and will have guidelines as to when to inform the Diocesan Advisory Committee before starting work.

A **Felling Licence** issued by the Forestry Commission is needed for any felling of trees over a certain volume of timber. However, there are exceptions, which include 'churchyards, orchards and gardens'. If your burial site is not a churchyard you may need to check this with your local Forestry Commission office.

Once you know if permission for work is required and have gained any necessary permission then the work can be planned.

Tree work that is suitable for volunteers

As with tree surveys there are some maintenance jobs which can be done by volunteers and some which will need a professional.

Routine tree maintenance suitable for volunteers

- Pruning small branches and small trees.



- Cutting back low branches where they are in the way or dead and broken branches which can be reached from the ground.
- Management of ivy, if it is impeding surveying, (see sheet A9, Pesky Plants and Animals).
- If you have a veteran yew then do not prune or cut, and do remove ivy.
- Remove tree seedlings which have taken root in the wrong places.
- Check stakes and ties on young trees, loosen or remove if needed.
- Make a stack of deadwood and let it slowly rot (see sheet A8, Helping Wildlife).

Tree work that is NOT suitable for volunteers

- Use of a chainsaw in a public place such as a burial ground.
- Use of any saw when off the ground (when climbing the tree or a ladder).
- Removing large limbs which could cause injury to people or damage buildings as they fall.
- Felling of entire trees other than seedlings or small saplings.

Unless you have a trained volunteer with personal accident and professional liability insurance for tree work then a tree contractor will be needed.

Useful contacts

Ancient Yew Group, www.ancient-yew.org
Arboricultural Association, www.trees.org.uk
Caring for God's Acre, www.caringforgodsacre.org.uk
International Society of Arboriculture, www.treesaregood.org
Local Authority Tree Officers
Tree Council, www.treecouncil.org.uk

Useful reading

Collins Tree Guide – David More & Owen Johnson
Forestry Commission – leaflets including Hazards from Trees
Trees in Britain, Europe and North America – Roger Phillips, Macmillan
Tree Name Trail – Field Studies Council fold-out chart
Veteran Trees: A Guide to Good Management – Natural England publication



Silver Birch