

Arboricultural Consultancy for AXA Insurance

Note: This report is intended for use between the client, Environmental Services and any parties detailed within the report. It is based on the understanding at the time of visiting the property that Engineers are satisfied that damage is attributable to clay shrinkage subsidence exacerbated by vegetation.

1. Case Details

Insured		Address	Stonehurst, Green Road, Barnsley, South Yorkshire, S75 3RP		
Client	Subsidence Management Services	Contact	Mauro Loscalzo	Claim No.	IFS-AXA-SUB-22-0104873
ES Ref	SA-252208	Consultant	Keith Burgess	Contact No.	0330 380 1036
Report Date	21/02/2023 Revised: 05/09/2023				

Scope of Report: To survey the property and determine significant vegetation contributing to subsidence damage, make recommendation for remedial action and assess initial mitigation and recovery prospects. The survey does not make an assessment for decay or hazard evaluation. This is a revised report, updating management advice based on the results of recent site investigations

2. Property and Damage Description

The insured structure is a 2 storey detached house. The property occupies a level site with no adverse topographical features.

We have been advised that the current damage relates to the rear left-hand corner of the insured dwelling, where cracking indicates downwards movement.

3. Technical Reports

In preparing our report we have had the benefit of the following technical investigations:

Soil Analysis	<input checked="" type="checkbox"/>	Drain Report	<input checked="" type="checkbox"/>	Foundation Detail	<input checked="" type="checkbox"/>
Root Analysis	<input checked="" type="checkbox"/>	Borehole Log	<input checked="" type="checkbox"/>	Monitoring	<input checked="" type="checkbox"/>

4. Action Plan

Mitigation	
Insured involved?	Yes
Local Authority involved?	Yes
Other third party Mitigation involved?	No
Recovery	
Is there a potential recovery action?	Yes

Treeworks	
Local Authority	Barnsley Metropolitan Borough Council
TPO / Conservation Area / Planning Protection Searches	Awaiting Searches from LA
Additional Comments	
Awaiting Further Instructions.	
A potential recovery action has been identified.	
Engineers should consider focusing investigations to strengthen factual evidence for disclosure to third party tree owners.	

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5. Technical Synopsis

This report is based upon our understanding at the time of visiting the property that Subsidence Management Services have concluded, on a preliminary basis, that the current damage is due to differential foundation movement exacerbated by moisture abstraction from vegetation growing adjacent to the property's foundations.

The conditions necessary for clay shrinkage subsidence to manifest have been established by site investigations and roots have also been recovered below foundation depths (BH3).

Samples of the roots recovered from underside of foundations have been identified (using anatomical analysis) as having emanated from the genera *Acer* spp. and probably *Quercus* spp. but possibly *Castanea* spp.

Given the above, vegetation is deemed to retain the capacity to be causal to the current movement / damage.

We have therefore been instructed to advise on the causal vegetation and to deliver management proposals which will provide on-going and long-term stability allowing repairs to be undertaken.

In assessing the potential drying influence of the vegetation on site, we have considered, in addition to the above, species profile, normally accepted influencing distance and the position of vegetation relative to the observed damage.

Our survey of the site identified T1 (Sycamore) and T2 (Oak) which, in our opinion, will be the source of the roots recovered and as such we have identified them as the primary cause of the current movement / damage.

The size and proximity of the above vegetation is consistent with the location of damage; accordingly, we have identified their collective / cohesive influence as the primary cause of the subsidence damage.

Given the above and considering the advised mechanism of movement, in order to mitigate the current damage thereby allowing soils beneath the property to recover to a position such that an effective engineering repair solution can be implemented, we recommend a program of vegetation management as detailed by this report.

Please refer to Section 6 for management prescriptions.

Preliminary recommendations contained within this report are prescribed on the basis that site investigations confirm vegetation to be causal; management advice is designed to offer the most reliable arboricultural solution likely to restore long-term stability and also facilitate liaison with third-party owners and/or Local Authorities where necessary.

Consequently, we have advocated the complete removal of T1 & T2 as it will offer the most certain arboricultural solution likely to restore long-term stability.

Replacement planting is considered appropriate with regards mitigating the impact of the works suggested; however, species selection should be appropriate for the chosen site and consideration must be given to the ultimate size of the replacement species and any future management requirements.

We recommend the role of vegetation and the efficacy of management recommendations be qualified by means of monitoring.

Please note that the footing of the insured property fall within the anticipated rooting distance of additional vegetation which we believe presents a foreseeable risk of future damage and accordingly we have made recommendations in respect of this.

The extent / impact of vegetation management required to restore and maintain long-term stability at this property is acknowledged. However, we consider the impact on the wider public amenity from the proposed tree works is mitigated by the presence of further trees and the scope for replacement planting.

Whilst replacement planting is considered appropriate, due consideration must be given to the ultimate size of the replacement and future management requirements. Species selection should be appropriate for the chosen site and consideration must be given to the ultimate size of the replacement species and any future management requirements.

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Is vegetation likely to be a contributory factor in the current damage?	Yes
Is vegetation management likely to contribute to the future stability of the property?	Yes
Is replacement planting considered appropriate?	Yes
Would DNA profiling be of assistance in this case?	No

6.0 Recommendations

6.1 Current Claim Requirements

These recommendations may be subject to review following additional site investigations.

Tree No.	Species	Age Cat	Approx. Height (m)	Distance to Building (m) *	Ownership	Action	Requirement
T1	Sycamore	1	19	7.0	B - Local Authority	Remove	Remove close to ground level and treat stump to inhibit regrowth. Distance stated relates to area of damage.
T2	Oak	1	16	2.0	B - Local Authority	Remove	Remove close to ground level and treat stump to inhibit regrowth. Distance relates to outbuilding.

Age Cat: 1 = Younger than property; 2 = Similar age to the property; 3 = Significantly older than property

* Estimated

6.2 Future Risk Recommendations

These recommendations may be subject to review following additional site investigations.

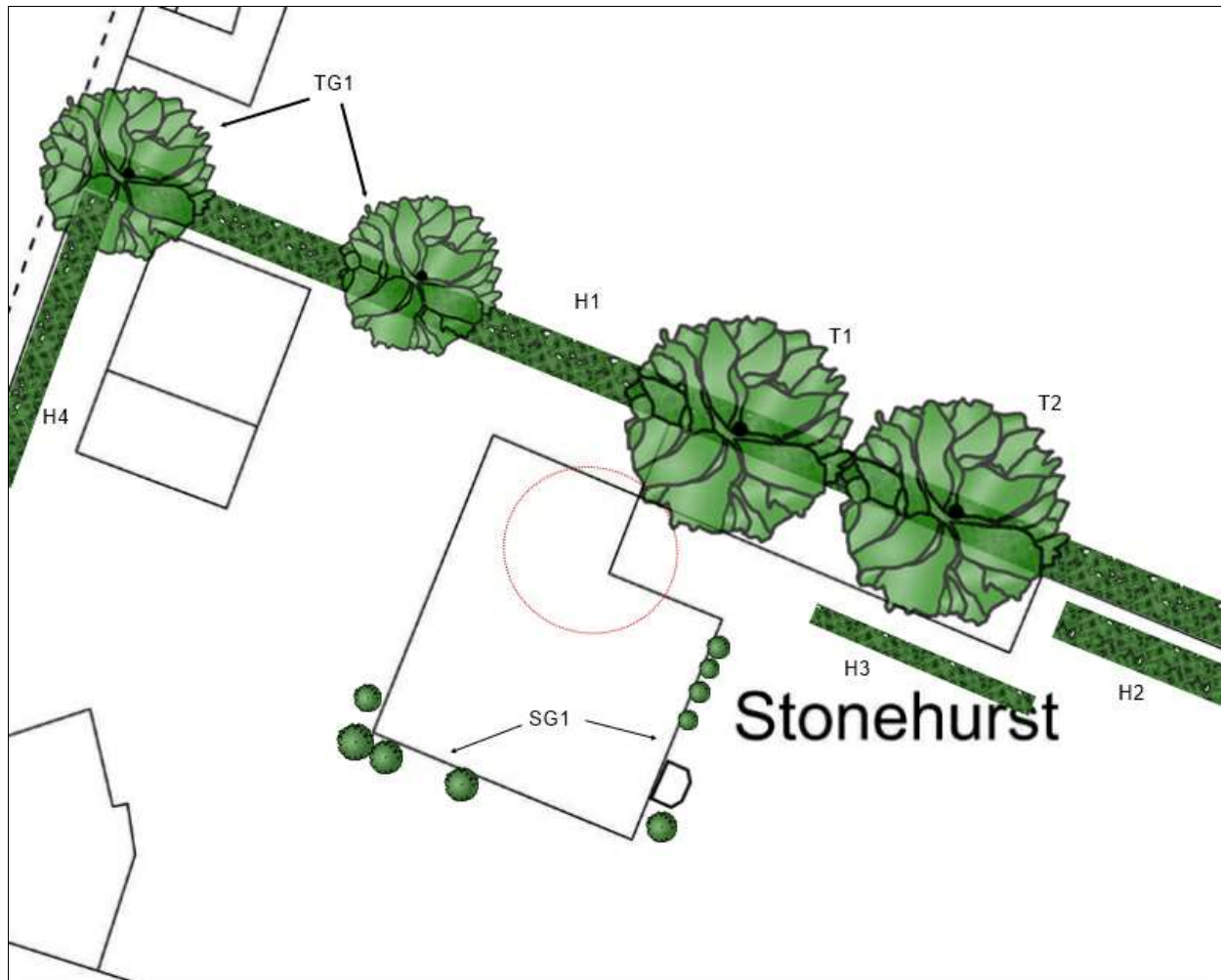
Tree No.	Species	Age Cat	Approx. Height (m)	Distance to Building (m) *	Ownership	Action	Requirement
H1	Mixed Species Hedge: including Holly & Cherry Laurel.	1	5	2.0	B - Local Authority	Action to avoid future risk	Maintain at, or below current dimensions by way of regular pruning.
H2	Cypress	1	5	3.0	C - Insured	Action to avoid future risk	Maintain at, or below current dimensions by way of regular pruning.
H3	Privet	1	2	1.6	C - Insured	Action to avoid future risk	Maintain at, or below current dimensions by way of regular pruning.
H4	Mixed Species Hedge: including Privet & Hawthorn.	1	5	2.5	C - Insured	Action to avoid future risk	Maintain at, or below current dimensions by way of regular pruning.
SG1	Mixed species shrubs: including Berberis & Pheasant Berry.	1	2	0.3	C - Insured	Action to avoid future risk	Maintain at broadly current dimensions by way of regular pruning.
TG1	Ash	1	12	2.0	B - Local Authority	Action to avoid future risk	Crown reduce overall canopy by 30% (minimum) to achieve a crown volume reduction in line with BRE IP7/06. Maintain at reduced dimensions by re-pruning back to points of previous reduction on a 3 year (max) cycle. Distance relates to outbuilding.

Age Cat: 1 = Younger than property; 2 = Similar age to the property; 3 = Significantly older than property

* Estimated

Third party property addresses should be treated as indicative only, should precise detail be required then Environmental Services can undertake Land Registry Searches

7. Site Plan



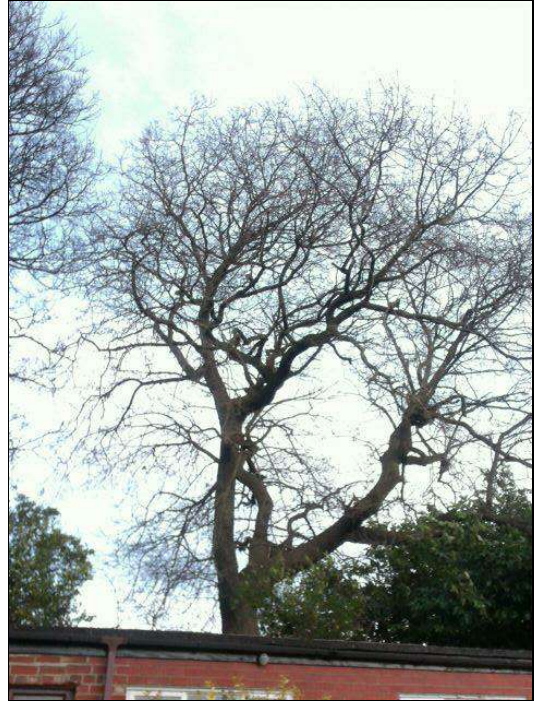
Please note that this plan is not to scale. OS Licence No. 100043218

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8. Photographs



T1 - Sycamore



T2 - Oak



H1 - Mixed species hedge



H2 - Cypress

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H3 - Privet



SG1 - Mixed species shrubs



TG1 - Ash



H4 - Mixed species hedge

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Date: 05/09/2023

Property: Stonehurst, Green Road, Barnsley, South Yorkshire, S75 3RP

9. Tree Works Reserve - Does not include recommendations for future risk.

Insured Property Tree Works	£0.00
Third Party Tree Works	£0.00
Provisional Sum	£0.00

- The above prices are based on works being performed as separate operations.
- The above is a reserve estimate only.
- Ownerships are assumed to be correct and as per Section 6.
- A fixed charge is made for Tree Preservation Order/Conservation Area searches unless charged by the Local Authority in which case it is cost plus 25%.
- Should tree works be prevented due to statutory protection then we will automatically proceed to seek consent for the works and Appeal to the Secretary of State if appropriate.
- All prices will be subject to V.A.T., which will be charged at the rate applying when the invoice is raised.
- Trees are removed as near as possible to ground level, stump and associated roots are not removed or included in the price.
- Where chemical application is made to stumps it cannot always be guaranteed that this will prevent future regrowth. Should this occur we would be pleased to provide advice to the insured on the best course of action available to them at that time. Where there is a risk to other trees of the same species due to root fusion, chemical control may not be appropriate.

10. Limitations

This report is an appraisal of vegetation influence on the property and is made on the understanding that that engineers suspect or have confirmed that vegetation is contributing to clay shrinkage subsidence, which is impacting upon the building. Recommendations for remedial tree works and future management are made to meet the primary objective of assisting in the restoration of stability to the property. In achieving this, it should be appreciated that recommendations may in some cases be contrary to best Arboricultural practice for tree pruning/management and is a necessary compromise between competing objectives.

Following tree surgery we recommended that the building be monitored to establish the effectiveness of the works in restoring stability.

The influence of trees on soils and building is dynamic and vegetation in close proximity to vulnerable structure should be inspected annually.

The statutory tree protection status as notified by the Local Authority was correct at the time of reporting. It should be noted however that this may be subject to change and we therefore advise that further checks with the Local Authority MUST be carried out prior to implementation of any tree works. Failure to do so can result in fines in excess of £20,000.

Our flagging of a possible recovery action is based on a broad approach that assume all third parties with vegetation contributing to the current claim have the potential for a recovery action (including domestic third parties). This way opportunities do not "fall through the net"; it is understood that domestic third parties with no prior knowledge may be difficult to recover against but that decision will be fully determined by the client.

A legal Duty of Care requires that all works specified in this report should be performed by qualified, arboricultural contractors who have been competency tested to determine their suitability for such works in line with Health & Safety Executive Guidelines. Additionally all works should be carried out according to British Standard 3998:2010 "Tree Work. Recommendations".