

1. INTRODUCTION

The Trust has a statutory duty of care. Members of the public and staff must not be put at risk because of any failure by the Trust to take all reasonable precautions to ensure their safety.

A Risk Assessment is necessary. There is a need to inspect trees in or near public places, or adjacent to buildings or working areas to assess whether they represent a risk to life or property, and to take remedial action as appropriate.

This Instruction sets out minimum standards of inspection, competence and record keeping.

In order to arrive at a Risk Assessment the two separate factors of Hazard and Risk must be addressed.

2. HAZARD AND RISK

Hazard is the potential to cause harm.

Like all living organisms, trees are subject to decline, senescence and collapse and they can be damaged physically or invaded by pathogenic organisms. As trees deteriorate so they are increasingly likely to shed limbs or fall in strong winds and the potential to cause harm increases.

Ancient and decaying trees are often beautiful and uniquely valuable as habitat for wildlife and, however poor the physical condition of a tree, remedial action is only necessary where there is a clearly perceptible risk to life or property. This might mean removing part of the tree or reducing the level of public access in the vicinity.

Risk is the level of likelihood that a hazardous tree will cause actual damage.

Risk is related to the location of the tree. It reflects the intensity of use of the immediate surroundings of the tree and the proximity of the tree to buildings or other structures.

3. THE TREE INSPECTION PROGRAMME

It is the responsibility of the Property Manager* (see note on page 4) to ensure that tree inspection procedures are in place and that they are undertaken only by staff or others who meet the requirements of competence set out in section 8.

The tree inspection programme has three stages;

- an assessment of risk;
- an assessment of hazard;
- a prescription for remedial action.

These need not all be undertaken by the same person.

4. ASSESSING THE LEVEL OF RISK

This is undertaken by the Property Manager* with advice from relevant Property Heads of Department.

For a programme of tree inspection to be manageable, most resources need to be directed to areas where there is potentially most risk to people and property. This is initiated by designating each part of a property to one of three Risk Zones. These should be clearly documented.

High Risk:	e.g.	close to main public areas, work yards, buildings, roads, car parks, major footpaths, picnic areas etc.
Medium Risk:	e.g.	other footpaths, bridle ways etc in regular but not intensive public use, quieter areas of parks and gardens etc.
Low Risk:	e.g.	farmland and woodland away from paths or only lightly used etc.

These zones will reflect normal usage but must be kept under review. The level of risk changes over time. For example, plans to hold an event involving many people in a medium risk zone will change its status to high risk for the duration of the event; new facilities or activities on a property may more permanently change the patterns of public usage and hence necessitate a review of the designated risk zone.

The designation of Risk Zones is a matter of informed judgement and periodic review. **It is the responsibility of the Property Manager* to ensure that Risk is periodically reviewed, realistically assessed and decisions documented.**

5. ASSESSING HAZARD

This is undertaken by a member of staff, volunteer or contractor (the Inspector) nominated by the Property Manager*.

It is the responsibility of the inspector to ensure that hazard is assessed to the best of his/her ability and recorded accurately.

Many trees are potentially hazardous but only the conditions most likely to lead to injury or damage to people or property can reasonably be addressed by inspectors. These are physical or physiological conditions which might lead to a break up or collapse of the tree. They are identified and recorded during a programme of inspection.

In practice only visible defects are likely to be identified. Techniques available to assess the structural integrity of standing trees, such as electronic sensors and hand operated borers, will not be used as a matter of course. Rather they will be used only where it is necessary to assess the extent of decay in particularly important trees already showing visible symptoms of decline.

Knowledge of the propensity of some species to break up or decay more rapidly than others is necessary but most property based staff who routinely work with trees would be competent to undertake this inspection after receiving basic introductory training.

The frequency and method of inspection will reflect the designated Risk Zones:

Risk Zone	Inspect	Method
High Risk	Annually in Autumn	Rapid but careful search for clear defects especially in the crown and around the base of the tree. Binoculars and probe required.
Retained trees in High Risk Zone showing significant defects	At least six monthly and after storms	Thorough inspection, monitoring rate of decline. Probe and ladder may be required.
Medium Risk	At least every two years	Rapid but careful search for clear defects.
Low Risk	During normal routine visits	No formal inspection, just observation and awareness of the general condition of the trees.

6. RECORD OF INSPECTION

Trees that appear to be sound during formal inspections require no documented record of their condition. Any omission from the record therefore implies that the tree has been judged to represent a negligible hazard.

Trees that are hazardous or potentially hazardous must be documented. A National Trust Tree Work Proposal Form (attached) has been developed to standardise the procedure. Software is also available to store this data, e.g. National Trust Tree Condition Data base. It enables individual annual tree records to be viewed simultaneously, providing a means of monitoring changing tree condition. Electronic recording of tree inspection data should be introduced as soon as practicable. Records must be retained for at least seven years.

7. DETERMINING REMEDIAL ACTION

The appropriate remedial action must be prescribed by a competent person. The necessary level of competence is defined in section 8.

A record of action proposed and action taken must be maintained using the NT Tree Work Proposal Forms or the appropriate electronic means described above.

The priority for implementing remedial action will depend on both the assessment of risk and hazard.

In a high risk area trees which show obvious signs of imminent collapse or are otherwise seriously hazardous should be dealt with immediately on the best advice available.

Otherwise, once approved by the Property Manager^{*}, remedial action must be implemented without unreasonable delay.

Provision must be made in property budgets for the implementation of tree inspection programmes and necessary remedial action on an annual basis as recurring expenditure.

8. COMPETENCE

Staff or volunteers undertaking the initial assessment of hazard should have some experience of tree work and must have received a minimum of one day's training in the recognition of tree defects. These courses can be arranged by Forestry Advisers at the request of Regional Personnel Officers.

Staff determining the appropriate remedial action must have good basic forestry or arboricultural experience and, as a minimum, a four day training in tree assessment at an approved Arboricultural Training Establishment. This course can be arranged by the Head of Forestry at the request of Regional Personnel Officers.

Consultants should normally be registered as consultants by the Arboricultural Association. A list is published annually.

9. COMMISSIONING TREE WORK

There is a presumption against the employment of specialist tree climbers on the staff of the Trust. This is on grounds of cost as well as safety. Tree climbing work will normally be contracted out.

Contractors should normally be selected from amongst those listed in the Directory of Approved Contractors published by the Arboricultural Association.

Work must be carefully specified and will be subject to relevant National Trust contract documentation:

‘The General Requirements and Conditions for Countryside and Garden Work’;

‘The Special Requirements and Conditions for Arboricultural Work’.

* If there is no designated Property Manager, the Managing Agent or Area Manager must nominate a competent member of staff to discharge the responsibilities of the Property Manager identified in this instruction.