

Tree Inventory and Preservation Plan

A Tree Inventory and Preservation Plan is a supportive document to the Arborist report that identifies the location, species, size and condition of all trees on the site and within 6m from the area of construction including trees on neighbouring sites, public lands and natural areas. It determines the potential effects of the proposed development on existing trees and vegetation and seeks to minimize injury and loss of trees and vegetation.

Required by Legislation

The Local Official Plan and Tree Protection Bylaw.

Who should prepare this plan?

The studies must be completed by a Certified Arborist who is either:

- › A full member of the Ontario Professional Foresters Association (OPFA)
- › A full member of the American Society of Consulting Arborists (ASCA)
- › A full member of the International Society of Arboriculture (ISA)
- › A Landscape Architect certified by the Ontario Association of Landscape Architects (OALA)
- › A Registered Professional Forester (RPF) as defined by the Professional Foresters Act S.O. 2000
- › A person with other arboriculture, forestry or ecology qualifications as approved by the Commissioner of Planning and Infrastructure

Why do we need this plan?

A Tree Inventory and Preservation Plan are required to:

- › Demonstrate conformity to any applicable by-laws or Official Plan policies
- › Provide staff with a basis on which to assess the proposed application with regard to tree preservation/protection issues and the overall contribution to the urban forest canopy cover

How should this plan be prepared?

A Tree Inventory and Preservation Plan should at a minimum contain:

Introduction

- › Address of the subject property
- › General site location of the subject property and context map
- › Project Name (if applicable)
- › Applicant and owner's contact information
- › Author name, title, qualifications, company name and appropriate stamp
- › Brief description of the proposal
- › Overview of the study area
- › Purpose of the study
- › Location and context map

How should this letter/report be prepared? (continued)

Proposal Description and Context

- › A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
 - › A description of the existing on-site conditions as well as surrounding areas, roads, natural areas, buildings, parking areas
 - › A description of the proposed development during construction and post development that may have an impact on the trees including the area of development, and units, servicing, storm water management, roads, parkland areas, recreational uses, lighting, site remediation, grading and filling for the subject and adjacent lands
 - › Concept plan for the development including building location, parking, access, amenity areas, grading, natural features and any natural hazards
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Investigation/Evaluation**Vegetation Inventory**

- › A description of the site vegetation and condition at the time of inspection including the private property, municipal property and adjacent properties that may be impacted by the development
 - › Identification of any species at risk
 - › A photo log of the site showing site conditions
 - › A tree inventory (and other vegetation species as required on a case-by-case basis) identifying all existing trees, their species, size and condition, including the tree canopy
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Impacts and Mitigation Measures

- › Trees proposed to be removed or retained
 - › A discussion of the rationale for proposed tree removal and retention
 - › Information to address tree protection measures for all retained trees
 - › A detailed tree protection methodology section to address those particular conditions where the proposed development will impact on the health and structural integrity of the trees
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Recommendations

- › Recommendations and methods for the containment and removal of any invasive species found
 - › Identification of any potential and imminent hazard tree(s)
 - › Proposed tree replacement/compensation and other recommendations based on municipal standards
 - › A cost valuation associated with trees to be removed and/or preserved may be required
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How should this letter/report be prepared? (continued)

Drawings and Supporting Information

Large format plan visually displaying the information presented in the tree study and other relevant information within the report including:

- › Tree numbers
- › Tree protection zone limits
- › Diagram/details of tree protection barrier type
- › Qualified Tree Consultant's contact information
- › Storage and staging areas including the construction access route
- › The drip lines of vegetated areas as staked by the Conservation Authority in conjunction with municipal staff
- › Species/name (scientific and common name)
- › Size (DBH); and
 - › Condition/health (a general rating of poor, fair, good or hazard based on the presence of cavities, decay, broken limbs/trunk, lean, root damage, form, disease, etc.)
- › A recommendation as to whether each tree should be preserved or removed and the reason for each recommendation
- › The location and details of any recommended tree preservation measures to be installed, including preservation measures
- › Include sediment control measures identified in any Sediment and Erosion Control plans
- › Overlay on Site Plan showing proposed site alterations including existing grades, proposed grades and services

The Site Servicing and Grading Plan that may accompany some applications must include the existing and proposed grades.

What else should we know?

The scope of the study should be discussed with the community planner and or other staff or relevant environmental agencies as part of the Mandatory Consultation phase.

Applicants should be aware of the regional and local tree bylaws, policies, and guidelines listed in this document, which are invaluable to understanding content requirements in any tree vegetation study report and tree protection plan.

No activity shall proceed on site until full evaluation of the existing vegetation and recommendations are determined and an approved plan for development has been processed or reached a satisfactory stage.

Boundary trees shall be evaluated on a site-by-site basis and may require additional written permissions from each landowner

The applicant may be requested to attend an on-site meeting with municipal and/or conservation authority staff to review existing natural features and vegetation prior to approval.

Work undertaken in regulated areas of Conservation Authorities will require a permit.

Additional Terms

To be identified by the local municipality where proposed development is located.

Study Submission Instructions

To be identified by the local municipality where proposed development is located.

What other resources are there?

Ontario Professional Planners Institute (OPPI) – [Hire an RPP](#)
[International Society of Arboriculture](#)
[Ontario Professional Foresters Association](#)
[Ontario Association of Landscape Architects](#)
[Toronto Region Conservation Authority Permits](#)
[Lake Simcoe Region Conservation Authority Permits](#)

About these Terms of Reference

These Terms of Reference were developed as a joint effort with participation by representatives from all York Region municipalities and the Region. The Terms of Reference are in widespread use across the Region, with local requirements added as prescribed by each municipality at the pre-consultation stage.

The need and scope for this study will be decided by a municipality during initial pre-consultation process with input from partner agencies. This pre-consultation process may include:

- Determination if this study is applicable
 - Confirmation of criteria within these Terms of Reference that are appropriate for your development project
 - Identification of specific technical components that need to be addressed
 - Identification of detailed standards to be met
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Notes:

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating the changes and whether or not the recommendations and conclusions are the same (Note: this is subject to the extent of the revisions).

A peer review may be required. The cost of the peer review will be borne by the applicant.

If the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered incomplete and returned to the applicant.