Terms of Reference:
Arborist Report

Purpose:

The purpose of this document is to establish the Town's requirements for the preparation and submission of the Arborist Report and its corresponding files.

This document provides a consistent framework for the assessment, preservation, removal and compensation of trees potentially impacted by development.

Who Should Prepare These Documents:

Arborist reports must be prepared by an International Society Arboriculture (ISA) Certified Arborist, or a Registered Professional Forester (RPF) certified in the province of Ontario. Arborists with Tree Risk Assessment Qualifications (TRAQ) are to aid in the preparation of the Arborist Report if hazardous trees are present.

Required in Support of:

- Always required in support of:
  - Zoning-By-Law Amendment (ZBA)
  - Draft Plans of Subdivision
  - Site Plan Application
- May be required in support of:
  - Consent Applications
  - Minor Variance Applications
  - Sensitive Sites (such as Heritage & Natural Heritage)
  - Site Specific Conditions

Definitions:

Tree Protection Zone (TPZ)	*The minimum area surrounding a tree, that is to be protected from disturbance to minimize impacts to the tree. In accordance with the Town of Caledon Tree Preservation Detail, the Tree Protection Zone is the Dripline of the tree.*
Diameter at Breast Height (DBH)	*The diameter of a tree trunk measured 1.4m from undisturbed grade directly beside the base of the tree trunk.*
Dripline	*Dripline means the imagined line from the outer edge of a Tree's foliage extending perpendicularly down to the ground.*
Tree Preservation Plan	*A plan identifying inventoried trees and their proposed disposition, including trees to be preserved, injured, or removed, together with required Tree Protection Zones and tree protection measures.*
Tree Inventory	*A documented inventory of trees on the subject property and within the required assessment, including tree identification, species, DBH, condition, ownership, recommended action and compensation requirements*
Species at Risk (SAR)	*A plant or animal species afforded protection under applicable federal or provincial species-at-risk legislations.*

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Arborist Report Requirements:

Below is the framework and required formatting for the Arborist Report with a brief description as to what should be outlined under each section. The Arborist Report shall include the following elements:

1.0 TITLE PAGE

- Address of the Subject Property
- Applicant's Name
- Development Application Number
- Author's Name, Certification Number and Company Name
- Date the Report was prepared

2.0 INTRODUCTION/BACKGROUND

- A site description, including municipal address of site, and existing site conditions such as existing buildings, and natural heritage features.
- A description of the proposed development of the site.

3.0 POLICY REVIEW

This section will require a brief description of the Town Standards, Town By-Laws, Regional and Provincial Standards, and Environmental Acts that are applicable to the application.

Examples of documents include:

- Provincial Policy Statements
- Region of Peel Official Plan
- Town of Caledon Official Plan
- Secondary Plans (if applicable)
- Comprehensive Town-Wide Design Guidelines
- Town of Caledon and Region of Peel Official Plan policies
- Town of Caledon Development Standards Manual
- Town of Caledon Standard Development Details and Notes
- Town of Caledon Comprehensive Town-Wide Design Guidelines
- Town of Caledon Site Plan Control Manual
- Town of Caledon Landscape Guidelines, and Landscape Approval Process
- Any applicable Conservation Authority Standards and Guidelines
- Niagara Escarpment Plan
- Oak Ridge Moraine Conservation Plan
- Species at Risk Act. and the Regulations thereunder
- Species Conservation Act. and the Regulations thereunder
- Migratory Birds Convention Act (MBCA), and the Regulations thereunder
- Ontario Forestry Act and the Regulations thereunder (If consent letters are required)

4.0 METHODOLOGY AND OBSERVATIONS:

- List date(s) of assessment.
- Inventory method of all trees surveyed on the subject site and within six (6) meters of all property lines.
- Overview of the Tree Inventory Chart (Refer to Section 8.2):

- A description or summary of the number of existing trees located on private property, town property, adjacent properties affected by any portion of the proposed development or lands associated with the development, and any tree(s) along shared lot lines.
- Note any Species at Risk (SAR) observed, and trees within the Protected Species in Ontario List.
- Note any woody invasive species observed.
- Identifying and documenting hazardous or potentially hazardous trees, site conditions and evidence of pre-existing damage or tree failure within Town properties.
    - Hazardous trees are any trees that pose a threat to people or property in publicly accessible areas. Common hazards include:
        - Broken or hanging branches.
        - Rotten wood or other threats to the structural integrity of the tree.
        - Cracks, splits, or fissures in the wood.

5.0 DISCUSSION/ RECOMMENDATIONS:

- Identification of any impacts that the proposed development may have on trees to be retained.
- Recommendation and methods for the containment and removal of any observed invasive species.
- Discussion on proposed mitigation measures to minimize impacts to trees to be preserved on site, including tree protection fencing, maintenance schedule and arboricultural work to be undertaken as recommended by the Arborist.
- Provide recommendations for mitigating hazards identified.
- Rationale for tree removal, including tree condition or conflict with proposed works.
- The following notes shall be included:
    - Minor grading works may be permitted at the edge of the Tree Protection Zone as required to correct localized grading issues adjacent to the proposed development at the discretion of the Town, this work is to be undertaken under supervision of the consulting Arborist. The consulting Arborist is to verify in writing to the Town, confirming that the work has been completed as per the approved design using best arboricultural practices.
    - Areas within the Tree Protection Zone shall remain undisturbed for the duration of the construction and shall not be used for the storage of excavation fill, building/construction material, structures, or equipment.

6.0 COMPENSATION:

Tree compensation is required for unavoidable removals of any existing healthy trees (in good or fair condition). Provide Tree Compensation and Cash-in-Lieu requirements and recommendations, based on the compensation rate determined by the Town.

6.1 Tree Compensation

- **Tree compensation is not required where the Town (NH) directs the Developer to remove invasive trees. However, removal of invasive trees by the Developer for development purposes is not exempt from the compensation requirements.**
- Compensation for tree removals shall be determined based on the diameter at breast height (DBH) as follows:

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I. Tree Removal on Town Owned Properties

Diameter at Breast Height (cm)	*Compensation Ratio*
<10	*1:1*
10-20	*1:1*
21-35	*2:1*
36-50	*3:1*
51-65	*4:1*
66-80	*5:1*
>81	*10:1*

II. Tree Removal on Privately Owned Properties

Diameter at Breast Height (cm)	*Compensation Ratio*
<10	*Not Applicable*
10-20	*1:1*
21-35	*2:1*
36-50	*3:1*
51-65	*4:1*
66-80	*5:1*
>81	*10:1*

- To be considered compensation, the proposed new trees shall meet or exceed the existing planting standards as currently outlined in the Town of Caledon Landscape Guidelines. Compensation trees shall be identified on the landscape drawings and shall also be listed on a separate plant list accordingly, unless otherwise directed by the Town staff. Furthermore, a two-year warranty will also be in effect for all compensation trees.
- Compensation trees within 200m of natural heritage features shall be of a species native to south-western Ontario. No nativars, non-native species, or cultivars will be accepted as compensation in these areas.
- Compensation trees shall not include any invasive species, refer to the Towns Preferred Street Tree and Preferred Naturalization Planting – Trees lists.

6.2 Cash-in-Lieu of Compensation Trees

- Where tree compensation cannot be accommodated through the proposed planting design, financial compensation shall be required at a rate (per compensation tree) as determined by the Town. Based on the applicable compensation ratio, compensation trees are required for the removal of trees associated with the proposed development.

7.0 SUMMARY/CONCLUSION:

Summarize the overall impact of the proposed project on the local trees. Information to be included in the conclusion are:

- Number of trees proposed for injury or removal.
- Replacement tree requirements & recommendations
- Cash in Lieu amounts

An Arborist report will be signed by the Arborist and include their title, qualifications and ISA Certification number.

8.0 APPENDICES:

8.1 List of Required Consent Letters

- If a consent letter is not obtained, the Town will reject the proposal for the removal of a neighboring tree. This will require the Arborist Report, Tree Inventory Chart and Tree Protection plan to be amended.
- The Town will not consider any Section 16 activity under the Species Conservation Act, for trees on the Protected Species in Ontario List (O. Reg. 60/26), unless proof of the following has been submitted to the Town: Registration with the MECP under O. Reg. 75/26; a Permit issued by the MECP under O. Reg. 74/26; or proof of compliance with the exceptions under O. Reg. 61/26 (specific MECP guidance material may apply to Butternut (*Juglans cinerea*) and Black Ash (*Fraxinus nigra*) trees).

8.2 Tree Inventory Chart

The Tree Inventory Chart shall contain (but is not limited to) the following:

- Tree Identification number (corresponding with the Tree Preservation Plan)
- Species (Common and Botanical Names)
- Size – Diameter at Breast Height (DBH), where trees are located on slopes, DBH shall be measured from the lowest undisturbed existing grade.
  - The DBH of multi-stem trees is calculated by multiplying each stem diameter by itself (the square), adding up all stem amounts, and calculating the square root of the total.

    Equation: $\sqrt{(a^2+b^2+c^2)}$
- Tree Protection Zone (TPZ), refer to Town of Caledon Tree Preservation Detail.
- Field measured dripline/canopy size in metres (m) – measured as a radius from the trunk of the tree at a point representative of the average canopy size.

- Health, Structure, and Overall Condition – ratings to be used are Good, Fair, Poor, and Dead (Refer to 1.5 Tree Compensation – Figure 18 – Example of Tree Health/Condition Value).
- Tree Ownership – Private, Neighbour, Town, Region, Conservation Authority or Shared (Boundary).
- Recommended action – preserve, injure or remove.
- Compensation required (yes/no) and quantity (refer to Section 6.0).
- Notes and recommendations based on field review (e.g. included bark, dead limb, vine removals, habitat tree, corrective pruning, etc.).
- Justification for injury, removal, or relocation, where proposed.

8.3 Tree Preservation Plan

Tree Preservation Plan shall be prepared by an International Society Arboriculture (ISA) Certified Arborist, a Registered Professional Forester (RPF) certified in the province of Ontario, or a full member of the Ontario Association of Landscape Architects (OALA) in good standing with a stamp. The Tree Preservation Plan is to be similar in size and scale to the Site Plan (24”x36” or ARCH D preferred) at a metric scale no smaller than 1:500. The Tree Preservation Plan shall contain (but is not limited to) the following:

- Title block:
  - Project Name, Municipal Address, and File Number
  - Property Owner Info, Applicant Info, and Consultant Info
  - Professional Certification – ISA Certification Number or OALA Stamp/Signature
  - Technical Drawing Controls – Drawing Title, Drawing Sheet/Number, Submission Date, Revision Table and Graphic Scale
  - Key Map and North Arrow
- Provide the assessment date(s) to correspond with the report.
- The entire plan shall be overlaid on a current property survey prepared by a certified Ontario Land Surveyor (OLS). Where a current property survey is unavailable, an up-to-date aerial photograph may be accepted, subject to the satisfaction of the Town.
- All inventoried trees corresponding to the Tree Inventory Chart clearly noted and numbered on the plan.
- Tree canopies and groupings/vegetation units illustrated graphically.
- All Tree Preservation Zones (TPZ) as per Town of Caledon Tree Preservation Detail.
- All trees to be protected and/or preserved to be shown in a solid line. Trees proposed for removal to be shown in a dashed line and/or clearly marked with a red “X” on the plan.
- All tree protection methods such as tree protection fencing illustrated on the plan and corresponding graphics illustrated in the legend.
- A legend which clearly identified all symbols, line types and line weights used on the plan.
- Include the following site and development information within the Tree Preservation Plan:

- Location of all existing features, including but not limited to walkways, roads, parking areas, fencing, structures, steps, ramps, retaining walls, slopes, berms, lighting, signage, site furnishings, and natural features where available (e.g. woodland boundaries, top of bank, watercourse, wetland boundaries, etc.).
- Proposed site development layout.
- All existing and proposed aboveground and underground utilities and infrastructure (hydrant, manholes, water valves, etc.).
- Storm Water Management infrastructure.
- Existing and proposed grading.

- Town standard tree preservation detail and tree preservation notes.

8.4 Site Photos

- Overall Site Conditions
- Inventoried trees, including trees proposed for removal, preservation, and protection.
- Hazardous or potentially hazardous trees, observed defects, structural concerns, and relevant site conditions.
- Areas of Interest
- All site photos shall identify tree identification tag numbers, the location of the site and direction of view.

9.0 SUBMISSION REQUIREMENTS:

The Arborist Report shall be submitted during the early pre-consultation and initial planning application stage before any grading, demolition or construction begins. The Arborist Report shall be submitted together with the Tree Inventory (to be included as an appendix to the Arborist Report) and the Tree Protection Plan. The Arborist Report files size shall not exceed 2GB.

10.0 ARBORIST LETTER:

An Arborist Letter is a short, concise professional note (usually 2-3 pages). This document focuses on a single, straightforward issue or question such as a quick health evaluation of a single tree or a basic hazard opinion.

When can an Arborist Letter be used in lieu of an Arborist Report:

- Minor or straightforward tree-related matters
- Confirms a specific condition or professional opinion
- Confirms that proposed work will not impact trees
- Provides a brief update or clarification to a previously submitted report
- Confirms a tree is dead, hazardous, or unsuitable for retention