

**TERMS OF REFERENCE FOR ARBORIST  
REPORTS, TREE PRESERVATION PLANS  
AND  
TABLELAND TREE REMOVAL  
COMPENSATION**



**Version 1.0  
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# Terms of Reference for Arborist Reports and Tree Preservation Plans

## Objective:

An Arborist Report and Tree Preservation Plan is required to determine any potential effects or impacts of the proposed development on existing vegetation and to ensure that the proposed work conforms to regulatory standards.

This document is to be read in conjunction with:

1. Town of Caledon and Region of Peel Official Plan policies
2. Town of Caledon Development Standards Manual (Version 5.0, 2019)
3. Town of Caledon standard development details and notes
4. Town of Caledon Comprehensive Town-Wide Design Guidelines (November 2017)
5. Town of Caledon Site Plan Control Manual Information Package (August 2019)
6. Town of Caledon Site Plan Control Manual Submission Package (August 2019)
7. Town of Caledon Woodland Conservation By-law 2000-100
8. any applicable Conservation Authority standards and guidelines
9. Niagara Escarpment Commission standards and guidelines
10. Oak Ridge Moraine standards and guidelines
11. Canadian Species at Risk Act
12. The Ontario Endangered Species Act
13. Ministry of Natural Resources and Forestry (MNRF) Butternut Tree Registration Guide
14. Region of Peel standards and guidelines.

## When Obligated:

In reference to the Town of Caledon's Official Plan Section 6.2.1.6.2, a Vegetation Analysis/Tree Preservation\* Plan shall be submitted as part of a complete application for an Official Plan Amendment, Zoning By-law amendment, Plan of Subdivision, Site Plan Applications, Plan of Condominium, Consent and all other development streams.

\* A Vegetation Analysis/Tree Preservation Plan shall be implemented through an Arborist Report as detailed below.

## Certified Professional/ Qualifications:

Arborist Reports, Tree Inventories and Tree Preservation Plans shall be prepared by a Certified ISA Arborist in good standing with the International Society of Arboriculture (ISA) or a Registered Professional Forester (RPF) in good standing registered in the province of Ontario.

## **Arborist Report Contents:**

The Arborist Report must be prepared in digital format and shall contain at minimum, the following:

### **1) Title page including:**

- Civic address of the subject property.
- Applicants name.
- Development application number.
- Author name, title and company name.
- Dates in which site visit(s) were conducted
- Date the report was prepared.

### **2) Scope of the Report including:**

- A description of the project type such as subdivision, site plan, plan of condominium, rezoning, etc.
- A description or summary of the number of existing trees located on the private subject 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.

### **3) Comments including:**

- Site condition and tree condition including canopy size.
- Mitigation and preservation procedures such as compaction alleviation techniques, root exploration or pruning methods, tree protection/hoarding measures, etc.
- Proposed tree work requirements.
- Species at risk observed such as *Juglans cinerea* (Butternut), etc.

### **4) Summary of Conclusions including:**

- Number of trees proposed for injury or removal.
- A list of signed consent letter(s) that will be required by the adjacent property owner(s) for any trees of ownership or shared that are proposed for injury or removal.
- Replacement tree requirements and recommendations at a compensation rate as determined by the Town.

### **5) Photos including:**

- Aerial photo of site and abutting properties.
- Overall site photos.
- Inventoried trees - both proposed for removal and to be preserved.
- Validation of DBH that Diameter at Breast Height was used 1.4m above ground of all inventoried trees.
- Any hazardous trees or conditions on site along with any pre-existing damage or previously hazardous trees.
- Areas of interest.

## **Tree Inventory/Survey:**

The Tree Inventory shall contain a summary chart prepared using a computer program such as Microsoft Excel or an equivalent and formatted as a PDF. The Tree Inventory shall be illustrated in chart form and is to be included in the Arborist Report and on the Tree Preservation Plan.

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

- All trees on the subject property which are **10cm** in diameter at breast height (DBH) and greater.
- All trees outside of the subject property on adjacent private land, within 6m of the abutting property lines which are **10cm** (DBH), in diameter and greater.
- All trees outside of the subject property which are on Town property, within 6m of the abutting property lines which are **10cm** (DBH), in diameter and greater.
- Any large groupings of trees that are under **10cm** (DBH) may be include as one item in the chart showing the general size ranges and species.
- Tree identification number, corresponding with the Arborist Report and Tree Preservation Plan. Onsite tree tagging is a requirement.
- Species Variety and Cultivar Name in both common and botanical forms.
- Size - Diameter at Breast Height (DBH) as measured 1.4m from undisturbed existing grade directly beside the base of the tree trunk. If the tree is located on a slope, the distance shall be measured from the lowest undisturbed existing grade.
- Health, Structure, and Overall Condition - ratings to be used are good, fair, poor, and dead.
- Size of the canopy, measured in meters from the trunk of the tree. If the canopy is an irregular shape the minimum and maximum distances from the base of the tree shall be included.
- Ownership of the tree - private, neighbour, Town or shared.
- Proposed action - preserve, protect or remove.
- Site Comments - included bark, cavity, hanger, dead limb, etc.
- Preservation Comments - including root exploration, pruning using air spade or hydro vac, etc.

## **Tree Preservation Plan**

The Tree Preservation Plan shall be prepared using AutoCAD or an equivalent computer aided design program and formatted as a PDF. Drawings are to be in 24"x36" or ARCH D minimum sizing layout to a metric scale no smaller than 1:500. The drawings shall contain at minimum the following:

- Title block including: North arrow, key plan, project name, owner, project address, application number, date, revision number (to match arborist report date), author of drawing (prepared by).
- The entire plan shall be overlaid on a current property survey developed by a certified Ontario Land Surveyor (OLS) with the existing buildings and site works plus the proposed development application illustrated for reference. Surveys used for base information will be considered valid for a period of 2 years or when changes have been made to the site (whichever comes first).
- The locations of candidate trees shall be recorded in the field using GPS technology with a typical accuracy of 30cm. Where existing trees are located within the vicinity of the property boundary, any applicable property lines must be accurately survey on site by a certified Ontario Land Surveyor (OLS) so that tree location and ownership can be verified accordingly prior to final approval by the Town.
- All inventoried trees corresponding to the Tree Inventory & Arborist Report clearly noted and numbered on the plan.

- Tree canopies illustrated graphically corresponding to canopy sizes identified in the Tree Inventory.
- All Tree Preservation Zones (TPZ) as per Town Standard 606.
- All trees to be 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 or root exploration trenches illustrated on the plan and corresponding graphics illustrated in the legend.
- A legend which clearly identifies all symbols, line types and line weights used on the plan.
- Town standard tree preservation detail 606 available at:  
<https://www.caledon.ca/en/townhall/resources/Fencing-Standards.pdf>
- Town standard tree preservation notes 710 & 711 available at:  
<https://www.caledon.ca/en/townhall/resources/Open-Space-Design-Standards.pdf>

### **Development Properties where no trees are affected:**

In the event that the proposed site to be developed or a portion of the site undergoing development does not contain any existing trees, a letter shall be submitted to the Town of Caledon by the certified ISA or RPF professional confirming the information accordingly. The letter shall include the certified professional’s signature and membership number.

### **Properties with Environmental Easements:**

The following information refers to residential lots that contain an environmental easement as a result of existing trees that were to be retained during the subdivision approval process.

- The easement outlines that any dead, dying and/or hazardous tree removal may be permitted to the Owner by the Town, provided that an arborist report is submitted to the Town by the Owner by an ISA or RPF certified professional. The arborist report is to follow the guidelines set within this document. Any proposed removals are subject to tree compensation requirement as outlined in the Town’s Tableland Tree Removal Compensation.

### **General Notes to be added to the Report:**

- During construction and prior to final approval by the Town, the consulting Arborist along with appropriate Town staff shall intermittently inspect the entire site. Any noted hazardous trees must be identified and removed prior to Assumption or earlier if deemed hazardous at the sole cost of the Owner/Applicant. Any records of maintenance or removals are to be submitted to the Town.
- Compensation will be required for all tree removals at a rate as determined by the Town’s Tableland Tree Removal Compensation. Tree compensation planting will be in addition to the standard required planting. In the event tree compensation cannot be accommodated for in the planting design, financial compensation shall be collected at a rate (per tree) as determined by the Town. Based on the compensation ratio, (insert number) replacement trees are required to compensate for the removal of trees on the subject property.
- Removals should occur outside of the breeding bird season (April 1- August 1). If this is not possible, clearance with an ecologist should occur prior to construction to ensure no loss of bird nest, egg or unfledged young.
- Any trees located on the property line or on the adjacent property that are proposed to be removed, pruned or injured, will require written consent from the adjacent landowner. All correspondence is to be forwarded to the Town prior to any removals.

- Minor grading works may be permitted at the edge of the preservation 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 the 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 site construction and shall not be used for the storage of excavated fill, building/construction material, structures or equipment.
- The limit of tree protection hoarding shall be confirmed in the field by the consulting arborist, Town staff and conservation authority (if applicable). The Owner/Applicant shall be responsible for ongoing maintenance and repairs to tree protection fencing to the satisfaction of the Town, until final approval by the Town and conservation authority (if applicable). The Owner/Applicant shall not remove and not cause or permit any tree preservation fencing to be removed without the approval of the Town and conservation authority (if applicable).

## Tableland Tree Removal Compensation

### Introduction:

The information below is provided in relation to the removals of existing healthy trees within the Tableland areas for all Town of Caledon development applications. Tree removals and compensation will be determined by an Arborist Report.

### Compensation:

Compensation for tree removals shall be determined based on the diameter at breast height (dbh) as follows:

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
>65	5:1

To be considered compensation, the proposed new trees shall exceed the existing planting standards as currently outlined in the Section 2.3 of the Development Standards Manual Version 5.0, 2019. Compensation trees shall be identified on the landscape drawings and shall also be listed on a separate plant list accordingly, unless otherwise directed by Town staff.

Table land compensation trees may be proposed within the conservation authority owned or regulated areas at the discretion of the jurisdictional conservation authority and the Town.

Compensation trees shall be sized as per minimum planting size chart as currently outlined in Section 2.3 of the Development Standards Manual Version 5.0, 2019 and Town of Caledon Site Plan Control Manual Submission Package (August 2019), unless otherwise directed by the Town.

**Cash-in-lieu of Compensation Trees:**

In instances where development applications are unable to meet the Town’s tree compensation numbers within the subject property, a cash-in-lieu option for the removal of table land trees may be considered at a rate as determined by the Town of Caledon.

**Exemptions, Limitations and Additional Information:**

Any existing butternut trees (*Juglans cinereal*) that are identified on the subject property must be assessed by a certified Butternut Health Assessor and follow the registration procedures as set out by the Ministry of Natural Resources and Forestry.

Removals within valleylands, wetlands or any lands being conveyed to the conservation authority shall be subject to any applicable compensation guidelines as per the jurisdictional conservation authority, unless otherwise directed by the conservation authority.

All healthy tree species deemed invasive that are proposed for removal subject to compensation. Compensation based upon the ratio and criteria as noted above will apply accordingly.

Any dead, dying or trees in poor condition will be exempt from tree compensation, unless otherwise within a residential lot environmental easement or as directed by the Town of Caledon.

Any dead, dying or trees in poor condition that are proposed to be removed within a residential lot environmental easement will not be exempt from compensation.