Tree assessment and PRF record

Original sample recording form | Version 2.0 review | 16 November 2026

Project and visit

Project / visit: _____ Record / continuation reference: _____

Sample recording aid for competent ecologists. Select the method and effort for the site; completion is not approval of works. Do not treat an uninspected area as a negative result.

Project reference

Survey / visit ID

Site name and address

Grid reference / coordinates and system

Visit date

Start / finish; timezone and UTC offset

Record local times and the applicable UTC offset; keep clock corrections separate.

Completed by: name and organisation

Role / competence / supervisor

Relevant licence and authorisation

Drawing / plan reference and revision

Number, holder, activity and conditions, or explain why not applicable.

Survey question and proposed works

Permissions, safety / biosecurity plan and access limits

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Ground Level Tree Assessment

Project / visit: _____ Record / continuation reference: _____

Record ground observations here. Do not present an inaccessible internal feature as fully inspected.

Tree ID

Tree species / identification certainty

Location / plan reference

Height, stem diameter, crown spread and units

Measured or estimated; assessment is not an arboricultural safety certification.

Age class / condition observations

TPO / conservation-area check and source

Habitat context, neighbouring trees and proposed impacts

Viewing positions, equipment and visibility

Leaf cover, ivy, obstructions and parts not seen.

Ground-assessment category

Linked feature IDs

Options: Not assessed, NONE, FAR, PRF, Uncertain.

Category rationale and features seen

Use the current BCT framework and record what is actually visible; do not translate older low/moderate/high tree classes.

Next inspection / assessment and reasons

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Separate PRF inspection record

Project / visit: _____ Record / continuation reference: _____

This sheet records an inspection; it does not authorise access, disturbance or tree works. Keep unknowns explicit.

Feature ID

Tree ID

Inspection date

Inspector / competence / authorisation

Height, aspect and plan/photo reference

Access and inspection method

Ground aid, ladder, climb, MEWP, endoscope or other; include limits and safety reference.

Feature structure and inspected extent

Opening, internal dimensions with units if observed, depth, upward extent, substrate, shelter and connections.

Inspection completeness

Options: Not inspected, Partly inspected, Extent inspected and recorded, Uncertain.

Feature assessment

Options: Not assessed, PRF-I, PRF-M, Uncertain.

Assessment rationale and limitations

Ground estimates are not a substitute for the inspection evidence needed to justify the category.

Original evidence and provisional interpretation

Record bats/signs, counts where meaningful, confidence, samples and unresolved evidence.

Photo / video / sample references

Interpretation and next steps

Project / visit: _____ Record / continuation reference: _____

Evidence summary and unresolved questions

Potential impacts of the specific works

Design options to retain features or avoid impacts

Record options discussed, assumptions and residual effects.

Further work, method / effort and ecological rationale

Record the relevant guidance, departures and evidence. No fixed visit-number calculator.

Limitations and consequence for the conclusion

Reviewed by: name / organisation and date

Actions: owner / due date

Evidence location / retention and access responsibility

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Instructions for this form

Project / visit: _____ Record / continuation reference: _____

1. Give every tree and potential roost feature a stable ID. Record the survey purpose, access, methods, conditions and actual surveyor.

2. Complete the ground assessment for observations made from the ground. Keep ground-level assessment distinct from a detailed feature inspection.

3. Record NONE, FAR or PRF only where the current assessment framework and evidence justify it; retain uncertainty and viewing limits.

4. Use a separate feature-inspection record when an inspection is undertaken. Record access method, authorisation, extent, evidence and limitations.

5. Record PRF-I or PRF-M only where inspection evidence supports the feature assessment. A category is not permission to fell, climb or disturb a tree.

6. Relate findings to the proposed works, avoidance options and any additional work. Keep the reviewer and evidence references.

7. Save and reopen the record, then inspect the printed/PDF copy. Repeat tree or feature records rather than mixing several features in one box.

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Using and sharing this sample form

Project / visit: _____ Record / continuation reference: _____

Ground Level Tree Assessment and separate potential roost feature inspection records.

Use the digital version for expandable records, long notes and data exports. PDF entry fields are interactive but have fixed visible space: check every completed page before sharing. Extra text may scroll inside a PDF field rather than print. Use a linked continuation page instead of hiding notes.

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Sources inform the original ACP prompts. This template does not reproduce BCT tables, imply BCT endorsement, replace competence or prescribe a universal survey programme. Record guidance/version and the rationale used for your project.

1. Collins (ed.), 2023. BCT Bat Surveys for Professional Ecologists, fourth edition; amended March 2024. Relevant chapters: buildings 5, trees 6, emergence 7 and data analysis 11.

Open source 1

2. BCT amendments and questions/answers, March 2024. Read the guidance in context; this is original ACP form wording, not a reproduced BCT table.

Open source 2

3. Natural England: bat protection, surveys and licences (England). Check the relevant regulator for other nations.

Open source 3