

TREE AND SITE IDENTIFICATION

Client _____ Date _____ Time _____

Address / tree location _____ Tree no. _____ Sheet _____ of _____

Tree species _____ DBH _____ Height _____ Crown spread dia. _____

Assessor(s) _____ Time frame _____ Tools used _____

TARGET ASSESSMENT

#	Target description	Target zone	Occupancy rate 1 rare - 2 occasional - 3 frequent - 4 constant	Practical to move target?	Restriction practical?
1					
2					
3					
4					

SITE FACTORS

History of failures _____ Topography ☐ Flat ☐ Slope ☐ Aspect

Site changes ☐ None ☐ Grade change ☐ Site clearing ☐ Changed soil hydrology ☐ Root cuts

Soil conditions ☐ Limited volume ☐ Saturated ☐ Shallow ☐ Compacted ☐ Pavement over roots

Prevailing wind direction _____ Common weather ☐ Strong winds ☐ Ice ☐ Snow ☐ Heavy rain

TREE HEALTH AND SPECIES PROFILE

Vigor ☐ Low ☐ Normal ☐ High

Foliage ☐ None (seasonal) ☐ None (dead) ☐ Normal ____% ☐ Chlorotic ____% ☐ Necrotic ____%

Pests / biotic _____ Abiotic _____

Species failure profile ☐ Branches ☐ Trunk ☐ Roots Describe _____

LOAD FACTORS

Wind exposure ☐ Protected ☐ Partial ☐ Full ☐ Wind funneling

Relative crown size ☐ Small ☐ Medium ☐ Large

Crown density ☐ Sparse ☐ Normal ☐ Dense

Interior branches ☐ Few ☐ Normal ☐ Dense

Vines / mistletoe / moss _____

Recent or planned change in load factors _____

TREE DEFECTS AND CONDITIONS AFFECTING THE LIKELIHOOD OF FAILURE

Crown and branches

☐ Unbalanced crown

☐ LCR ____%

☐ Dead twigs / branches ____% overall, max dia. ____

☐ Broken / hangers, number ____ max dia. ____

☐ Over-extended branches

☐ Pruning history: crown cleaned, thinned, raised, reduced, topped, lion-tailed, flush cuts, other

☐ Cracks

☐ Lightning damage

☐ Codominant

☐ Included bark

☐ Weak attachments

☐ Cavity / nest hole ____% circ.

☐ Previous branch failures

☐ Similar branches present

☐ Dead / missing bark

☐ Cankers / galls / burls

☐ Sapwood damage / decay

☐ Conks

☐ Heartwood decay

Main concern(s) _____

Load on defect ☐ N/A ☐ Minor ☐ Moderate ☐ Significant

Likelihood of failure ☐ Improbable ☐ Possible ☐ Probable ☐ Imminent

Trunk

☐ Dead / missing bark

☐ Abnormal bark texture / color

☐ Codominant stems

☐ Included bark

☐ Cracks

☐ Sapwood damage / decay

☐ Cankers / galls / burls

☐ Sap ooze

☐ Lightning damage

☐ Heartwood decay

☐ Conks / mushrooms

☐ Cavity / nest hole ____% circ.

☐ Depth ____

☐ Poor taper

☐ Lean ____° corrected?

☐ Response growth

Main concern(s) _____

Load on defect ☐ N/A ☐ Minor ☐ Moderate ☐ Significant

Likelihood of failure ☐ Improbable ☐ Possible ☐ Probable ☐ Imminent

Roots and root collar

☐ Collar buried / not visible, depth ____

☐ Stem girdling

☐ Dead

☐ Decay

☐ Conks / mushrooms

☐ Ooze

☐ Cavity ____% circ.

☐ Cracks

☐ Cut / damaged roots, distance from trunk ____

☐ Root plate lifting

☐ Soil weakness

☐ Response growth

Main concern(s) _____

Load on defect ☐ N/A ☐ Minor ☐ Moderate ☐ Significant

Likelihood of failure ☐ Improbable ☐ Possible ☐ Probable ☐ Imminent

RISK CATEGORIZATION

Conditions of concern	Part size	Fall dist.	Target	Likelihood of failure	Likelihood of impact	Failure and impact	Consequences	Risk rating

Matrix 1: likelihood of failure and impact					Matrix 2: risk rating					
Failure ↓ / Impact →	Very low	Low	Medium	High	Failure and impact ↓ / Consequences →		Negligible	Minor	Significant	Severe
Imminent	Unlikely	Somewhat likely	Likely	Very likely	Very likely		Low	Moderate	High	Extreme
Probable	Unlikely	Unlikely	Somewhat likely	Likely	Likely		Low	Moderate	High	High
Possible	Unlikely	Unlikely	Unlikely	Somewhat likely	Somewhat likely		Low	Low	Moderate	Moderate
Improbable	Unlikely	Unlikely	Unlikely	Unlikely	Unlikely		Low	Low	Low	Low

MITIGATION AND RESIDUAL RISK

Mitigation option	Residual risk

Overall tree risk rating ☐ Low ☐ Moderate ☐ High ☐ Extreme

Work priority ☐ 1 ☐ 2 ☐ 3 ☐ 4

Advanced assessment needed ☐ No ☐ Yes, type / reason _____

Overall residual risk ☐ Low ☐ Moderate ☐ High ☐ Extreme

Recommended inspection interval _____ Data ☐ Final ☐ Preliminary

Inspection limitations ☐ None ☐ Visibility ☐ Access ☐ Vines ☐ Root collar buried

Notes, explanations, descriptions _____

Field order and terminology follow the ISA Best Management Practices: Tree Risk Assessment (2nd ed.) so the worksheet transfers to the ISA Basic form or to PHC Rx without re-mapping. Fill it on your phone and export the report at phcrx.app.