

Foothills Growth and Yield Association
Regenerated Lodgepole Pine Trial

FIELD MANUAL
for
MEASUREMENTS AND MAINTENANCE

Version 3.1

July 2010



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1 General

This document is intended primarily for use by FGYA contractors engaged in ongoing measurement and maintenance of the trial. For these purposes it replaces all previous versions as of July 15, 2009. (Amendments relative to 2008 are summarized in Appendix 2.)

The remainder of this section summarizes the ecological and treatment categories by which installations and plots are classified, and the layout of installations. Sections 2, 3 and 4 describe procedures for measurements, maintenance and quality control respectively.

Each installation is uniquely referenced by a sequence of 3 digital codes representing its eco-class (see Table 1), group (valid codes are 1 – 5), and planting density (see Table 2). Treatment plots within each installation are further referenced by vegetation management treatment (see Table 3).

Table 1. Eco-Classes

Code	Eco-class (and Edatope)
1	Bearberry / lichen / hairy wild rye (submesic / subxeric, medium – low)
2	Labrador tea – mesic (mesic – poor)
3	Billberry / cranberry / sarsaparilla / rhododendron (mesic / medium)
4	Honeysuckle / fern (subhygric – rich)
5	Labrador tea – hygric (hygric – poor)

Table 2. Installation Planting Densities

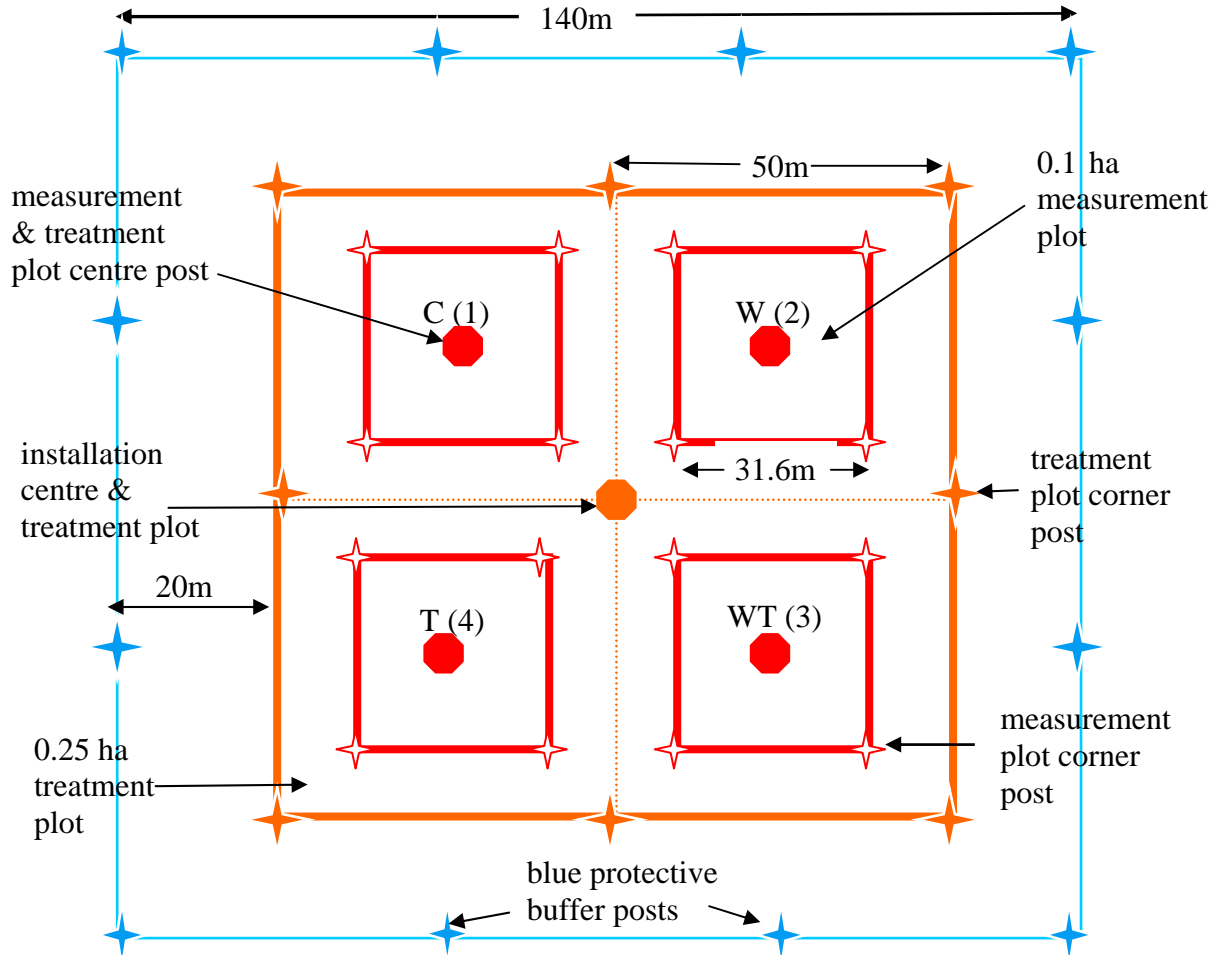
Code	Spacing (m ²)	Target Planting Density (stems/ha)	Target Trees/plot (0.25 ha/0.1 ha)
0 or 9	Control	0	0
816	3.5	816	204/82
1111	3.0	1111	278/111
1600	2.5	1600	400/160
2500	2.0	2500	625/250
4444	1.5	4444	1111/444

Table 3. Plot Vegetation Management Treatments

Code	Plot #	Treatment	Treatment Description
C	1	Control	No vegetation management treatments
W	2	Weeding	Remove competing vegetation
WT	3	Weeding & Thinning	Treatments 2 & 4
T	4	Thinning	Pre-commercially thin to target density

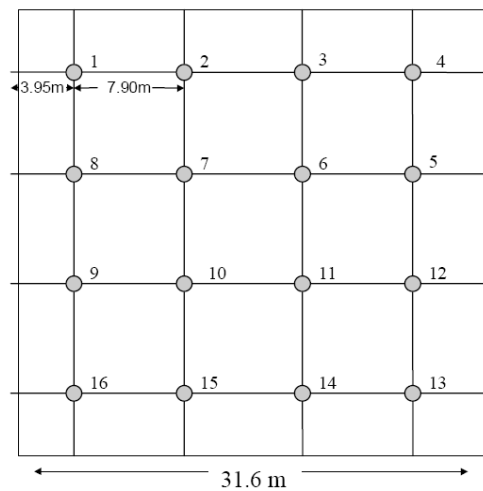
Figure 1 portrays a standard non-split installation. In some installations treatment plots have been re-aligned or separated to fit into the targeted site. Before carrying out any measurement or treatment on any plot, treatment plot post demarcation and field notes should be checked.

Figure 1. Installation Diagram



In every measurement plot there are 16 circular regeneration sub-plots (radius 1.78m) marked with green plot centers. They are laid out on a 7.90 m square grid as shown in Figure 2.

Figure 2. Regeneration Plot Layout



2 Measurements

2.1 Numbering, Type and Timing of Measurements

A unique and sequential measurement number will be assigned by the database manager to each scheduled measurement of a treatment plot. Measurements are of 2 types: full measurements and vigour checks (see Table 4).

Table 4. Measurement Types and Associated Measurement Requirements

Measurement Variables	Measurement Type	
	Full measurement (FM)	Vigour check (VC)
Coniferous ingress	Required	Not required
Competition – shrubs and herbs	Required	Not required
Competition – deciduous trees	Required	Not required
Tree size and growth	Required	Not required
Vigour	Required	Required
Health	Required	Required ¹

¹ Required for trees that have died since the last measurement to indicate probable cause of mortality.

Full measurements will continue to be required every 2 years until 12-14 years have elapsed since harvest, and will alternate with vigour checks to be conducted in the intervening years. Detailed measurement schedules will be provided annually. Full measurements will be made between July 15 and September 15. Vigour checks may be made any time between July 1 and September 15.

For each tree in the database (i.e.: all tagged trees within measurement plots), a sample type must be correctly assigned. Valid sample types are shown in Table 5.

Table 5. Tree Sample Types

Code	Sample Type
C	Crop Tree
S	Sample Tree
B	Crop Tree & Sample Tree
N	Neither ¹

Procedures for selecting sample trees are described below. Procedures for identifying crop trees are described in Section 2.6.

Sample Tree Selection - Planted Installations

(This procedure should have been followed in previous measurements for all planted installations.)

The selection and tagging of sample trees provides the basis for tracking an unbiased sample of approximately 50 trees individually on each treatment plot. The selection of sample trees for planted installations is carried out only once; After their initial selection they remain the same

¹ Trees tagged and assessed for health and vigour, which are neither crop or sample trees, are assigned the code “N”.

year to year. (Exception: during a fill plant, dead sample trees may have been replaced, given unique numbers, and assessed as new sample trees). Other than in a fill-planting situation, sample trees are not to be replaced. Where mortality of sample trees has occurred and no fill-plant has taken place there will be less than 50 sample trees.

To select the sample trees in planted installations, start by selecting all tagged trees within each regeneration plot until 50 sample trees have been selected. On lower density installations, you may not have 50 trees within the 16 regeneration plots, in this case, go back to the first plot and select the closest pine outside the regeneration plot, go to the next plot and do the same, continue doing this until you've achieved the required 50. Sample trees must be flagged on their respective pigtails with BLUE ribbon (alternatively, pigtails may be painted blue)

Sample Tree Selection - Non-Planted “0 density” Installations

(This procedure should have been initiated in non-planted installations having natural regeneration.)

For each treatment plot, start in regeneration plot # 1, measure out one metre, due North, from the regeneration plot center, and at this location, tag and number the closest lodgepole pine volunteer > 10 cm in height, within the 1.78 metre radius regeneration plot. Next, in the same regeneration plot, follow the same procedure twice more but measuring out one metre due East and then one metre due South, from the regeneration plot center, tagging and numbering the closest lodgepole pine volunteer > 10 cm in height. Once you have selected the three sample trees in regeneration plot #1 as noted above, move to the next regeneration plot and follow the same procedure starting with your first tree being the closest lodgepole pine volunteer > 10 cm in height as measured from a point 1 metre due West from the regeneration plot centre. If three sample trees are located at each regeneration plot (16), two extra sample trees will have to be selected to achieve a total of 50, these can be located in any regeneration plot. As you proceed with the selection process, alternate the selection location in order from N to E to W to S, this will result in an unbiased selection method. The regeneration plots need not be divided into theoretical quadrants for the selection process, simply select the lodgepole pine volunteer > 10 cm in height which is closest to the 1 metre point in the particular cardinal direction that you are using. By doing this instead of using a “quadrant”, we can select two or more sample trees which are located right next to each other in the same cardinal direction where clumping of trees is occurring. A maximum of 4 sample trees per regeneration plot, and 50 sample trees per measurement plot may be selected. Unlike on the planted plots, sample trees in non-planted installations WILL NOT be selected from outside the regeneration plot. Where less than 50 trees are located within the 16 regeneration plots, the additional sample trees will be tagged if and when further ingress occurs.

The identification and tagging of sample trees should be continued at each full measurement until there are 50 sample trees tagged per plot. Following full measurements any regeneration plot that has three or more naturals greater than 10 cm must have three trees tagged.

The plot measurement type and tree sample type define what tree measurements are required as follows:

VC (vigour check) measurement type:

- Valid vigour code required for all tagged trees, regardless of sample type.

- If tree has died since last measurement, a health code is also required to explain cause of death if known.

FM (full) measurement type:

- If sample type = S or B: all tree size and growth information, plus vigour and health, must be recorded;
- If sample type = C: vigour and health codes are required, plus height is recorded in the regeneration plot table;
- If sample type = N: vigour and health codes only are required.

Details of required measurements are provided below.

2.2 Density of Coniferous Natural Regeneration (Coniferous “Ingress”)

- Required for FM (Full Measurements) only.
- In each 1.78 meter radius regeneration plot (16), record the number of live naturally regenerated coniferous trees >10.0 cm in height, by species. (Valid species codes are shown in Table 6.)
- Partition the counts by height into <30cm and 30cm+.

Note: “height” is defined as the vertical distance between ground level and the base of the terminal bud, as in Section 2.3.1.

For trees 30cm+ in height:

If the count is less than or equal to 10, the exact number of trees should be recorded. However, if the stem count exceeds 10, an estimate (accurate to +/- 10%) is acceptable.

For trees <30cm in height:

If the count is less than or equal to 10, the number of trees should be recorded to a required accuracy of +/- 2 trees. However, if the stem count exceeds 10, an estimate (accurate to +/- 20%) is acceptable.

Table 6. Coniferous Species Codes

Code	Species
Fa	Sub-alpine Fir
Fb	Balsam Fir
Lt	Tamarack (Larch)
Pj	Jack pine
Pl	Lodgepole Pine
Sb	Black Spruce
Se	Englemann Spruce
Sw	White Spruce

2.3 Size and Growth (Sample Trees)

For each Sample Tree measure/collect the following information during scheduled full (FM) measurements.

2.3.1 Tree Height:

- Record the tree height from tree stem ground level to the base of the bud. If identification of “stem ground level” is uncertain because of uneven slope, litter etc., measure on the side of the stem where the ground level appears closest to the germination point. Leaning trees are to be measured from the base of the bud plumb to the ground level. E.g.; If a tree had an extreme lean of about 45° you would measure from the base of the terminal bud straight down to the ground, in other words, you do not measure the *length* of the tree, only the *height* above ground level.
- Precision: record to nearest 0.1cm on trees < 2 m tall, trees over 2 m are recorded to nearest cm. Accuracy required for trees < 2 m to within +/- 1 cm or 1%, whichever is greater, and for trees > 2 m +/- 2%.

Any trees which have “shrunk” significantly in height since the last measurement should have a valid health code or comment explaining shrinkage. Contractors should have previous measurements available in data collectors or on tally forms to assist in identifying these trees.

2.3.2 Ground Line Diameter / Stump Diameter / Breast-Height Diameter:

- For each sample tree, record stem diameter in cm at ground level (GLD). Be careful not to damage trees with the calipers when taking measurements.
- Tree diameter is measured at ground line only until the sample tree has reached 2.0m in height. Once a tree has reached 2.0m in height, diameter will also be measured at 1.3m (DBH) and 0.3m (DSH).
- For one measurement only all 3 diameters will be required (GLD, DSH, DBH); thereafter GLD can be dropped.
- Precision: record all diameters to the nearest 0.1cm, accurate to within +/- 0.2cm or 2%, whichever is greater.

2.3.3 Crown Diameter:

- For each sample tree, record the crown diameter at the widest point. Disregard “rogue” branches which would give a false assessment of crown diameter.
- Precision: record to the nearest cm. Accuracy required to within +/- 5 cm for trees < 3 m, +/- 10 cm for trees > 3 m.

2.3.4 Crown Length:

- For each sample tree, record the crown length in cm. Start at the bottom where the live crown starts and measure up to the tip of the terminal bud. Disregard “rogue” branches which would give a false assessment of crown length.

- Precision: record to the nearest cm. Accuracy required for trees < 2 m to within +/- 1 cm or 1%, whichever is greater, and for trees > 2 m +/- 2%.

2.4 Health

Health assessments are required on all tagged trees during full (FM) measurements). They are also required during vigour (VC) checks for any tagged tree that has died since the last measurement.

Table 7. Health Codes

Code	Description	Code	Description	Code	Description
AB	Fire	DFE	Needle Rusts General	IP	Pitch Blister Moths
AC	Chemical Pollutants (not pesticides)	DM	Lodgepole Pine Dwarf Mistletoe	IR	Wood Borers
AD	Drought	DR	Root Diseases	IRF	Flathead Borers
AE	Winter Damage	DRA	Armillaria Root Disease	IRM	Clearwing Moth
AES	Snow or Ice	DS	Stem Diseases	IRW	White Spotted Sawyer Beetle
AEW	Winter Desiccation	DSA	Atropellis Canker	IRY	Northeastern Sawyer Beetle
AF	Frost	DSB	White Pine Blister Rust	IT	Terminal Weevils
AFC	Frost Crack	DSC	Comandra Blister Rust	ITS	White Pine Weevil
AFH	Frost Heaved	DSD	Sphaeropsis (Diplodia) Blight	ITT	Lodgepole Terminal Weevil
AFK	Shoot/Bud Frost Damage	DSF	Sweet Fern Blister Rust	IW	Root Weevils
AH	Hail	DSG	Scleroderris Canker	IWA	Northern Pine Weevil
AL	Lightening	DSH	Hypoxylon Canker	IWP	Couper Collar Weevil
AO	Flooding	DSR	Diplodia Gall and Rough Bark	IWS	Yosemite Bark Weevil
AR	Redbelt	DSS	Stalactiform Blister Rust	IWW	Warren Root Collar Weevil
AWS	Soil Failure	DSW	Western Gall Rust	TC	Chemical
AWT	Treatment or Harvesting Related	IAG	Gall Forming Aphids	TL	Logging
AX	Scarring/Rubbing	IAO	Open feeding Aphids and Adelgids	TM	Mechanical
CL	Condition - Leaning	IAP	Pine Needle Scale	TP	Planting
CDT	Dead Top	IB	Bark Beetles	TPJ	J Root
CFT	Fork Top	IBA	Ambrosia Beetles	TPM	Poor Planting Microsite
CNL	New Leader	IBL	Lodgepole Pine Beetle	UNS	Seedling Shrinkage – Unexplained
CSM	Settling Mound (microsite)	IC	Defoliators – Coniferous	VP	Vegetation Press
DB	Broom Rusts	ICA	Needle Miners General	WA	Bear
DD	Stem Decays	ICG	Black Army Cutworm	WB	Browsing Damage
DDP	Red Ring Rot	ICN	Sawflies General	WBC	Cows or Horses
DED	Damping off Disease	IDC	Cankercworms General	WBH	Hare or Rabbit
DEG	Grey Mold	IE	Engravers/IPS	WBU	Ungulates (Deer, Elk, Moose)
DEM	Powdery Mildew	IM	Seed and Cone Insects	WM	Mice or Voles
DF	Needle Diseases	IMD	Coneworms	WP	Porcupine
DFB	Needle Cast General	IME	Eastern Pine Seedworm	WS	Squirrel
DFD	Elytroderma Needle Cast	IMS	Cone Maggots	WY	Sapsuckers

For each tagged tree within the measurement plot, record up to two of the valid health codes listed in Table 7. If no health issues are apparent, record “NONE” for the first health code.

Pay particular attention to the codes listed in Table 7 that are bolded. These are factors that are known or expected to be significant causes of mortality or damage that could pre-dispose tree to other mortality factors in young lodgepole pine growing in west-central Alberta, and differentiation of which might lead to different management interpretations. Identification aids for these “key” factors are provided under separate cover.²

If a condition is observed which is not listed in Table 7, record as a comment and notify the Field Coordinator.

2.5 Vigour and Source

Assessment of vigour is required in all scheduled measurements (measurement types FM, VC). For each tagged tree within the measurement plot, record one of the five vigour codes indicated in Table 8.

Table 8. Vigour Classes

Code	Description
AL	Alive and likely to survive
AU	Alive but unlikely to survive
D	Dead
M	Missing
CM	Confirmed Missing (2010)

For the 2010 measurement season, it is extremely important to make every effort to locate any missing trees which have never been confirmed dead (including trees in database designated as Missing Never Dead (MND). These “missing” trees are either located and assessed for vigor, or, designated as Confirmed Missing (CM).

All trees recorded for vigour must be correctly differentiated by source: “P” for Planted and “N” for Natural.

2.6 Competition and Crop Tree Assessment

Competition and crop tree assessments are required during full measurements.

A “Crop tree” is defined as the coniferous tree with the best overall height, diameter³, and health within each (1.78 m radius) regeneration plot. Each treatment plot will have a maximum of 16 crop trees. Initially, on planted installations, the crop tree should be a planted pine. However, if a naturally regenerated conifer in a regeneration plot exceeds the height and diameter of an existing crop tree, and is at least as healthy and vigorous as the crop tree, then that natural seedling is to be tagged and numbered as the new crop tree. Moreover, any *planted* pine in a regeneration plot, which exceeds the height, diameter, and health of an existing crop tree will

² *Identification of Key Health and Mortality Factors for the Foothills Growth and Yield Association Regenerated Lodgepole Pine Trial* (Extracts from: *Field Guide to Forest Damage in British Columbia*, March 2001, Second Edition, MOF/CFS Joint Publication Number 17, Edited by John Henigman, Tim Ebata, Eric Allen, Joan Westfall, and Adriane Pollard. www.for.gov.bc.ca/hfp/forsite/pest_field_guide)

³ Use the highest recorded diameter for this assessment i.e. DBH if measured, otherwise stump diameter if measured, otherwise ground-line diameter.

also replace the existing crop tree. (It will be tagged and numbered already so just record that number as the new crop tree). Crop trees will continue to be replaced by better candidates throughout the life of the plots, often more than once. Once a crop tree has been replaced by a better candidate, the replaced crop tree is no longer measured for any size and growth measurements (unless it is a sample tree).

Crop trees must have their respective pigtailed flagged with GREEN ribbon. Once a crop tree has been replaced with a better candidate the ribbon must be removed and placed on the new crop tree.

In control plots, the best natural coniferous (ingress) seedling within each regeneration plot is selected as the crop tree (minimum 10cm height). This “natural” crop tree must be tagged and given a unique number.

Collect the following information at each regeneration plot. Note that deciduous competition and shrub and herb competition are all assessed using the regeneration plot post as the plot centre.

2.6.1 Crop Tree Data

Record the number, species and source of the crop tree, plus all size and growth measurements i.e. “Crop” trees will have exactly the same information collected as described for “Sample” trees in Section 2.3.

2.6.2 Deciduous Competition

Number of Stems >30cm in Height, by Species:

- Record for each deciduous species the number of stems 30cm+ in height within 1.78 m of the regeneration plot centre.
- If the number of deciduous trees in the plot is less than or equal to 10, the exact number of trees should be recorded. However, if the stem count exceeds 10, an estimate (+/- 10%) is acceptable. This may be obtained by estimation from a representative segment of the circular plot (e.g. counting trees in a ¼ segment, and multiplying by 4 to obtain the estimate for the plot).

Suckered deciduous stems are counted as individuals if the suckering has occurred under ground and is not visible. A “group” of stems visibly suckered and/or originating above ground may be counted as a single stem.

Height and Diameter for Deciduous Species:

- In the 1.78 m radius regeneration plots, record the modal height and modal ground-line diameter for each deciduous species⁴. Modal height or diameter is the most frequently occurring height or diameter in a plot, not necessarily the average.
- Also record the species, height, ground-line diameter and (for trees over 2m in height) DBH of the tallest deciduous tree over 30 cm height.
- Precision: record heights to the nearest cm and diameters to the nearest 0.1cm. Required accuracies:

⁴ Valid species codes are AW (aspen), PB (black poplar) and BW (white birch).

- Modal height: +/- 2 cm on trees < 1 m tall, auditor’s discretion on trees > 1 m tall
- Diameters: +/- 0.2 cm.
- Height of tallest deciduous: for trees < 2 m to within +/- 1 cm or 1%, whichever is greater, and for trees > 2 m, +/- 2%.

2.6.3 Shrub and Herb Competition

During full plot measurements, provide estimates for every regeneration plot (1.78m radius) of the percent of ground covered by each of the vegetation categories listed in Table 9. Table 10 indicates the area and some dimensions associated with various cover percentages, to assist in estimation. Record modal (predominant and most frequently occurring) heights of shrubs, herbs and grasses. Record percent cover and heights consistently regardless of whether the vegetation appears to be competing with crop trees. Percent cover must always be between 0 and 100 for each vegetation category. Heights must be recorded for any category where the percent cover is greater than zero.

Table 9. Assessment of Shrub and Herb Competition

Variable	Description
WillowAlderGE30PctCover	Percent cover of willow and / or alder equal to or taller than 30cm in height
WillowAlderGE30Ht	Modal height of willow and alder equal to or taller than 30cm in height
OtherShrubGE30PctCover	Percent cover of shrubs equal to or taller than 30cm, other than willow or alder
OtherShrubGE30Ht	Modal height of shrubs equal to or taller than 30cm, other than willow or alder
ShrubLT30PctCover	Percent cover of ground shrubs (any species) less than 30cm in height
ForbPctCover	Percent cover of all non-graminoid, non-woody vascular plant species
ForbHt	Modal height of all non-graminoid, non-woody vascular plant species
GrassPctCover	Percent cover of all graminoid species (including grasses, sedges, rushes)
GrassHt	Modal height of all graminoid species (including grasses, sedges, rushes)
MossPctCover	Percent of forest floor (including advanced decayed downed wood) covered by moss
LichenPctCover	Percent of ground covered by lichens

Table 10. Dimensions for Cover Percentages of a Regeneration Plot

Percent Cover	Area (cm ²)	Radius (cm)	Diameter (cm)	Side of square (cm)
1	1,000	18	36	32
5	5,000	40	80	71
10	10,000	56	113	100
20	20,000	80	160	141
30	30,000	98	195	173
40	40,000	113	226	200
50	50,000	126	252	224
60	60,000	138	276	245
70	70,000	149	299	
80	80,000	160	319	

90	90,000	169	339	
100	100,000	178	357	

The species indicated in Table 11 must be noted **where they are the predominant species** within their vegetation category on the plot. Only one species can be noted in each vegetation category.

Table 11. Shrub and Herb Species of Interest

Vegetation Category	Species and Code
WillowAlder (GE 30 cm)	Willow (SALIX), Alder (ALNUS)
OtherShrubGE30Ht	Honeysuckle (LONICER), Labrador tea (LEDUM), rhododendron (RHODALB)
Forbs	Fireweed (EPILANG)
Grasses	Calamagrostis (CALAMAG)

- Precision: Record percent cover to the nearest percent and heights to the nearest cm.
Required accuracies:
 - Percent covers: +/- 10%
 - Modal height: +/- 2 cm on plants < 1 m tall, auditor’s discretion on plants > 1 m tall

2.7 Photographs

Now that all installations are established, the taking of photographs will be optional (at the discretion of the plot owner), unless specifically requested for defined research or demonstration purposes. If the option is selected, the following methodology applies:

At each treatment plot center (4 per installation), take one landscape orientated photo toward each treatment plot corner. This will give four photos per treatment plot and therefore 16 photos per installation. Photographs should be digital and labeled accurately. Contractors will confirm the photograph submission format and protocol with the database manager prior to any collection of data.

3 Maintenance

The items indicated in Table 12 must be checked at each plot measurement visit, and the listed requirements met.

Pinning, numbering and regeneration plot assignment of trees will be checked and maintained at each measurement. All seedlings planted within measurement plots, plus naturally regenerated trees designated as sample or crop trees, should be pinned and numbered, using 9-gauge 45 cm painted wire pins, aluminum tags and wires. Any tagged tree within 1.78 m of a regeneration plot centre stake should be correctly assigned to that regeneration plot. Do NOT assign regeneration plot numbers to trees that are outside the regeneration plot.

Unlike in measurements, where errors are tolerated within specified limits, no errors or omissions are acceptable in installation and plot maintenance.

Table 12. Installation and Plot Maintenance Requirements

Item	Requirement
Access Maps	Accurate, and updated if access has changed.
Installation Tie-point	Clearly visible. Marked with the azimuth and distance to installation center.
Installation Buffer	Clearly visible around the entire installation. Conduit poles pounded securely into the ground and blue paint refreshed as required. As trees begin to approach 2m tall, blue ribbon should be tied to the lateral branches (never to the main stem!) of regenerating trees to make the buffer easier to see.
Installation Centre Post	Pounded securely into ground. Orange paint clearly visible. Flagged with orange ribbon. As neighbouring trees reach 2m tall, witness trees should be flagged on lateral branches only. Tagged with the installation number.
Treatment Boundary Corner Posts	Pounded securely into ground. Orange. paint clearly visible. As neighbouring trees reach 2m tall, witness trees should be flagged (when possible) on lateral branches only.
Measurement Boundary Corner Posts	Pounded securely into ground. Red paint clearly visible. As neighbouring trees reach 2m tall, witness trees should be flagged on lateral branches only.
Measurement and Treatment Plot Centre Post	Pounded securely into ground. Red paint clearly visible. Tagged with the installation number and treatment type.
Regeneration Plot Centre Post	Every measurement plot must contain 16 green regeneration plot centre posts properly positioned and securely pounded into ground.
Tree Demarcation	<p>Number on tags is clear & legible. Clearly displayed (i.e. off the ground).</p> <p>Pigtails are utilized ONLY until trees are robust enough to allow for either:</p> <ol style="list-style-type: none"> 1) Placement of a big-loop-tag to the main stem (providing a minimum of 4 inches of diameter slack to allow for growth) or 2) Tagging a lateral branch <p>Trees tagged with a big-loop or tagged on lateral branch will be flagged appropriately (green/blue/both) on a lateral branch.</p> <p>If utilized, pigtails are placed 20cm North of their assigned tree and are marked with the appropriate color ribbon (sample tree = blue, crop tree = green, both = blue/green)</p>

	If pigtails are utilized and there is <u>ANY</u> doubt as to which tree is represented, the tree itself may be flagged with the appropriate color and/or tagged (flagging and/or tagging tree stem must be done in a non-restrictive manner, and, will be only utilized until transfer to main stem big loop tag or lateral branch demarcation)

4 Quality Control

4.1 Measurements and Maintenance

Required accuracies of measurements are specified in Section 2. Note the distinction made between precision and accuracy. “Precision” refers to how the data should be recorded. Quality control audits will be made to check whether measurements are within the “required accuracy” (i.e. acceptable error limit) specified for each variable. No errors or omissions are acceptable in plot maintenance.

Field contractors are encouraged to submit completed data sheets to the Field Coordinator as soon as possible to allow for quick audits. Installation maintenance and measurements will be checked by the Field Coordinator in consultation with the applicable company technical representative. Failures will be placed in one of 3 categories:

1. Minor outage: an issue that can be rectified during the next regularly scheduled field visit.
2. Moderate outage: an issue that can be rectified during the next regularly scheduled field visit; however additional measurements may need to be taken.
3. Major outage: an issue that cannot be fixed at the next regularly scheduled field visit.

Identified outages will be regarded as potentially applying to all plots measured by the contractor within the sample year. The Field Coordinator will discuss observed problems with the respective company technical representative and notify the field contractor of any required remedial action. Major outages (and some systemic moderate outages) will require the field contractor to ensure that all plots visited for that sample year have been fixed. The Field Coordinator will re-audit corrected plots, and will provide a recommendation for payment to member companies only when satisfied that all quality control issues have been addressed.

4.2 Data Loading

All data must be submitted using the Contractor Loading Database (CLDB). The CLDB is a Microsoft Access database provided to each of the contractors engaged to undertake measurements. Contractors receive a personalized version of the database that contains all the installations they are scheduled to measure. It includes previous measurement data and error-checking routines.

Regardless of how data is collected in the field, it must be loaded into this database. Prior to submission of data, all error checking routines must be run and any problems identified must be corrected. On receipt of the data, the database manager and / or Field Coordinator will verify whether the data passes the quality control checks, and will notify the contractor and company representative to this effect within 2 weeks of receiving the data.

The error checks incorporated into the CLDB and applicable for the 2010 field season are described in Appendix 1.

Appendix 1. Quality Control Checks for Loading Data – 2010

Measurement Plot Information						
Error ID	Error Description	Minimum Value	Maximum Value	Tolerance Percent	Tolerance Absolute	Criteria Limiting Application
2	Missing or Invalid Plot Measurement Type			0	0	
3	Missing /Invalid Start Date	16/07/2010	15/09/2010	0	0	Measurement type FM
3	Missing /Invalid Start Date	01/07/2010	15/09/2010	0	0	Measurement type VC
4	Missing /Invalid End Date	01/07/2010	15/09/2010	0	0	
5	Missing Contractor			0	0	
6	Crew Initial			0	0	
7	Excessive Days Between Start and End (warning)			0	10	

Regeneration Plot Information						
Error ID	Error Description	Minimum Value	Maximum Value	Tolerance Percent	Tolerance Absolute	Criteria Limiting Application
1	Invalid Crop Tree Number			0	0	
2	Missing /Invalid Crop Tree Height	0.1	700	0	0	Tree Sample Type C or B
9	Invalid Ingress Species 1			0	0	
10	Invalid Ingress Species 2			0	0	
11	Invalid Ingress Species 3			0	0	
35	Missing /Invalid Start Date	16/07/2010	15/09/2010	0	0	
36	Missing /Invalid End Date	16/07/2010	15/09/2010	0	0	
37	Invalid Contractor			0	0	
38	Excessive Days Between Start and End (warning)			0	10	
39	Missing IngressCount1_LT30	0		0	0	
40	Missing IngressCount1_GT30	0		0	0	
41	Missing IngressCount2_LT30	0		0	0	
42	Missing IngressCount2_GT30	0		0	0	
43	Missing IngressCount3_LT30	0		0	0	
44	Missing IngressCount3_GT30	0		0	0	
45	Invalid WillowAlderGE30 PctCover	0	100	0	0	
46	Invalid WillowAlderGE30 Ht	30		0	0	WillowAlderGE30 PctCover >0
47	Invalid WillowAlderGE30 Valid Species Code			0	0	
48	Invalid OtherShrubGE30 PctCover	0	100	0	0	
49	Invalid OtherShrubGE30 Ht	30		0	0	OtherShrubGE30 PctCover >0
50	OtherShrubGE30 Invalid Species Code			0	0	
51	Invalid ShrubLT30 PctCover	0	100	0	0	
52	Invalid Forb PctCover	0	100	0	0	
53	Invalid Forb Ht	>0		0	0	Forb PctCover >0
54	Forb Invalid Species Code			0	0	
55	Invalid Grass PctCover	0	100	0	0	
56	Invalid Grass Ht	>0		0	0	Grass PctCover >0
57	Grass Invalid Species Code			0	0	
58	Invalid Moss PctCover	0	100	0	0	
59	Invalid Lichen PctCover	0	100	0	0	

Regeneration Plot Information (Deciduous)						
Error ID	Error Description	Minimum Value	Maximum Value	Tolerance Percent	Tolerance Absolute	Criteria Limiting Application
1	Invalid Decid Species 1			0	0	
2	Invalid Decid Species 2			0	0	
3	Invalid Decid Species 3			0	0	
4	Missing /Invalid Start Date	16/07/2010	15/09/2010	0	0	
5	Missing /Invalid End Date	16/07/2010	15/09/2010	0	0	
6	Excessive Days Between Start and End (warning)			0	10	
7	Missing DecidCount1	0		0	0	
8	Missing DecidCount2	0		0	0	
9	Missing DecidCount3	0		0	0	
10	Missing /Invalid DecidModalHt1	>0		0	0	DecidCount1 >0
11	Missing /Invalid DecidModalHt2	>0		0	0	DecidCount2 >0
12	Missing /Invalid DecidModalHt3	>0		0	0	DecidCount3 >0
13	Missing /Invalid DecidModalDiam1	>0		0	0	DecidCount1 >0
14	Missing /Invalid DecidModalDiam2	>0		0	0	DecidCount2 >0
15	Missing /Invalid DecidModalDiam3	>0		0	0	DecidCount3 >0
16	Missing /Invalid DecidSelectSp			0	0	DecidCount1 >0
17	Missing /Invalid DecidSelectHt	>0		0	0	DecidSelectSp Is Not Null
18	Missing /Invalid DecidSelectAge	>0		0	0	DecidSelectSp Is Not Null
19	Missing /Invalid DecidSelectDBH	>0		0	0	DecidSelectSp Is Not Null

Tree Information						
Error ID	Error Description	Minimum Value	Maximum Value	Tolerance Percent	Tolerance Absolute	Criteria Limiting Application
1	Missing or Changed Species			0	0	
2	Missing/invalid Height	0.1	700	0	0	Sample Type S or B
3	Shrinking Height (warning)			0	10	
4	Missing/invalid Ground Line Diameter	0.1	20	0	0	Height<200
5	Shrinking Ground Line Diameter (warning)			0	0.1	
6	Missing/invalid DBH	0.1	20	0	0	Height=>200
7	Shrinking DBH (warning)			0	0.1	
8	Suspect DBH/Ht Ratio (warning)	0.002	0.04	0	0	
9	Suspect GLD/Ht Ratio (warning)	0.002	0.04	0	0	
10	Shrinking Crown Length (warning)			0.5	0	
11	Shrinking Crown Diameter (warning)			0.5	0	
27	Dead to Live (warning)			0	0	
28	Missing Vigour/Health Code Information			0	0	
29	Invalid Tree Species			0	0	
30	Missing/Invalid Crown Length	0.1	700	0	0	
31	Missing/Invalid Crown Diameter	0.1	700	0	0	
32	Crown Length > Height (warning)	0	0	5	5	
33	Invalid SampleType Code			0	0	
34	Invalid Source Code			0	0	
35	Invalid Vigour Code			0	0	
36	Invalid Health Code 1			0	0	
37	Invalid Health Code 2			0	0	
38	Missing Regen Plot Number/Closest Regen Plot (warning)			0	0	

Tree Information (continued)						
Error ID	Error Description	Minimum Value	Maximum Value	Tolerance Percent	Tolerance Absolute	Criteria Limiting Application
39	Missing/Invalid DSH	0.1		0	0	Height>200
40	Missing/ Invalid Stem Map Information			0	0	
41	DBH > GLD			0	0	
42	DBH > DSH			0	0	
43	Missing or Changed Source			0	0	
44	Possible Missing/invalid Ground Line Diameter (warning)	0.1	20	0	0	Height >200
45	Suspect DSH/Ht Ratio (warning)	0.002	0.04	0	0	

Appendix 2. Latest Amendments

Table 12. Installation and Plot Maintenance Requirements

Tree demarcation procedure clarified.

Sample Tree Selection - Non-Planted “0 density” Installations

Clarify that sample trees on non-planted installations are NOT to be selected outside of regen plots.

Vigour and Source

Code “CM” (Confirmed Missing) added to Table 8. Vigour Class.

Table 13. Vigour Classes

Code	Description
AL	Alive and likely to survive
AU	Alive but unlikely to survive
D	Dead
M	Missing
CM	Confirmed Missing (2010)

For the 2010 measurement season, it is extremely important to make every effort to locate any missing trees which have never been confirmed dead (including trees in database designated as Missing Never Dead (MND)). These “missing” trees are either located and assessed for vigor, or, designated as Confirmed Missing (CM).