Old-growth Forest
Field Sampling Protocols for Citizen Science

Level 1 – Basic Survey Protocol v2.1

Peterborough Old-growth Forest Project
Ancient Forest Exploration & Research
Funding provided by the Ontario Trillium Foundation

July 16, 2019

Introduction

It is generally accepted that all types of old-growth temperate forests in Ontario are endangered ecosystems, and the vast majority of them remain unprotected and available to logging. These unique landscapes provide numerous benefits to people locally, regionally and globally including carbon storage and sequestration, biodiversity protection, education, scientific study, recreation, and spirituality. In this document, we present a sampling protocol that has been developed to support field surveys of potential undocumented old-growth forests in Peterborough County, Ontario to be carried out by citizen scientists during the 2019 field season. However, it is also applicable to other temperate forest landscapes in Ontario.

This protocol is a rapid assessment technique that is designed to cover large areas of old-growth forest in a relatively short period of time with minimal technical expertise. It is designed primarily to conduct ground-truthing in forests that have the potential to be in the "old-growth" condition. More area can be covered with this protocol for a given time period compared with the other three protocols. In contrast, Protocol Levels 2, 3 and 4 require more time-intensive area-based sampling and expertise that can support quantitative forest descriptions and comparisons with other studied old-growth forests. In general, as protocol levels increase so does the required level of expertise as well as the time required per unit area. For all protocol levels, we recommend using *Trees of Ontario* (Kershaw 2001) or *Forest Plants of Central Ontario* (Chambers et al. 1996) to identify tree species, however, there are many other good tree identification field guides that apply to Ontario.

Whenever possible, Ancient Forest Exploration & Research (AFER) will create maps of potential undocumented old-growth forests to support citizen-science surveys and will recommend high priority areas for sampling. However, since these protocols include a minimum tree diameter at breast (4.5 ft) height (DBH) and circumference at breast height (CBH) (Table 1), AFER maps are not required for the use of the Basic Survey Protocol (Levels 1). AFER mapping should be used, however, for Protocol Levels 2 through 4. Metric units are used for these protocols. For those using tapes with English units, 1 inch is equal to 2.54 cm – be sure to convert when applying the values presented here.

The conservation status of Ontario's temperate forests at risk (all forest ages) is provided in Tables 2 and 3, which can be used to help determine which forest types and/or forest community types for citizen scientists to focus their surveys on. Some may prefer to survey in old-growth forests that are most at risk thus increasing the likelihood that they may be protected.

AFER will collect, analyze and present field data and related results obtained by citizen scientists on one or more of AFER's websites. These protocols will inevitably be revised as the number of old-growth forest surveys carried out by citizen scientists grows and feedback is received. In particular, we are interested in the relationships among tree age, tree size and habitat conditions in order to refine our predictions of tree age from tree diameter under a variety of growth influences.

Level 1 – Basic Survey Protocol

Overview: The *Basic Survey Protocol* is the only protocol that should be used by those who do not have confidence in their ability to identify tree species. No approved field leader is required. There are two ways to apply this protocol. The first is through the use of AFER's project on iNaturalist, a phone app that checks and verifies species identifications through the submission of photographs and field data while recording geolocation. The project is called "Peterborough Old-Growth Forest Project – Level 1". The second way is to send tree photos (jpg format), tree data (Excel file), and site observation notes (Word file) directly to AFER at datasubmission@ancientforest.org.

Variables (features) to Assess: (1) Tree species identification (including photos of tree bark, tree foliage/crown), (2) tree DBH (cm) or circumference (cm) for those that meet the old-growth size criterion for each tree species, (3) tree geolocation (lat., long. or easting, northing), (4) stump diameter (cm), and (5) stump geolocation should be determined. The minimum DBH or CBH for most old-growth tree species found in Peterborough County is provided in Table 1 and should be used to decide which trees to measure. Surveyors are encouraged, but not required, to record site observations at the location of each big tree measured, which will provide qualitative (no measurements) information about the immediate surroundings and the landscape context of the tree. A site observations form is provided in Appendix A.

Spatial Distribution of Samples (measured trees): Surveyors should document as many big trees as possible and ideally distribute the sampled trees throughout all portions of the forest stand to the extent possible given time available and experience level. Often, however, sampling will be limited to areas that are quickly and easily accessed.

Recommended Equipment and Materials: (1) Tree identification field guide, (2) local topographic maps, (3) compass, (4) GPS unit or phone with a GPS app, (5) camera, (6) pens, pencils, and field notebook, (7) DBH tape or standard measuring tape for CBH, (8) binoculars (to view branches, leaves/needles), and (9) standard bushwack-hiking items such as a first-aid kit, bug jacket, mosquito repellent, rainwear, waterproof boots, etc.

Bibliography

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TABLE 1. Estimated Minimum Diameters for Old-growth Forest Trees in Temperate Forests of Ontario

Species	Minimum Old-Growth Age (yrs)	Minimum Diameter (cm/in)	Minimum Circumference (cm/in)
American Basswood	110	60	188
American Beech	140	30	94
Balsam Fir	70	30	94
Black Ash (from Green Ash)	120	50	157
Black Cherry	120	50	157
Black Spruce Swamps	100	15	47
Black Spruce Uplands	100	30	94
Bur Oak (from White Oak)	120	40	126
Eastern Hemlock	140	40	126
Eastern White Pine	120	50	157
Jack Pine	120	25	79
Poplar	90	40	126
Red Maple	90	35	110
Red Oak	120	50	157
Red Pine	120	40	126
Silver Maple	120	60	188
Sugar Maple	140	35	110
Tamarack	90	25	79
White Ash (from Green Ash)	120	50	157
White Birch	100	35	110
White Cedar	110	30	94
White Oak	120	40	126
White Spruce	100	30	94
Yellow Birch	140	45	141

TABLE 2. Conservation Status of Temperate Forest Types in Central Ontario (on the Canadian Shield)
(>60% dominance in the overstory; all ages; based on FRI data) (Watkins, 2011)

Forest Type	2001		2006		2011		10-yr Change	Conservation Status
	Ha	%	Ha	%	Ha	%		
American Basswood	263	0.02	177	0.02	177	0.01	declined (33%)	Critically Endangered
American Beech	2,261	0.2	388	0.2	404	0.03	declined (82%)	
Yellow Birch	4,913	0.3	5,670	0.4	5,366	0.4	increased (9%)	
Eastern Hemlock	20,236	1.4	18,140	1.5	18,618	1.5	declined (8%)	Endangered
Red Maple	165,213	11.6	21,043	12.5	20,930	1.6	declined (87%)	
Ash (Black & White)	24,575	1.7	29,792	1.9	27,580	2.2	increased (12%)	
Oak (all; primarily Red)	52,671	3.7	37,271	4.0	38,902	3.0	declined (26%)	Threatened

Red Pine	59,193	4.2	67,195	4.5	73,025	5.7	increased (36%)	**Special Concern**
Balsam Fir	102,838	7.2	127,316	7.8	100,940	7.9		
White Spruce	99,007	7.0	115,953	7.5	108,785	8.5		
Eastern White Pine	110,607	7.8	121,607	8.4	130,916	10.2		**Common**
Northern White Cedar	237,805	16.8	253,444	18.0	237,691	18.6		
Sugar Maple	539,900	38.0	521,883	40.9	515,099	40.3		
Total	1,419,482		1,319,879		1,278,433			

TABLE 3. Ontario's Endangered Forested Ecosystems
(Ontario NHIC 2019; https://www.ontario.ca/page/natural-heritage-information-centre)

Critically Imperiled Forested Ecosystems (S1)
Upland Types
Cedar Forests
Red Cedar Basic Treed Rock Barren
Red Cedar Treed Granite Barren
Red Cedar Treed Limestone Barren
Hickory Forests
Shagbark Hickory-Prickly Ash - Philadelphia Panic Grass Treed Alvar Grassland
Oak Forests
Black Oak Tallgrass Dry Savannah
Black Oak-Pine Tallgrass Dry Savannah
Black Oak-White Oak Tallgrass Dry Woodland
Black Oak-White Oak Tallgrass Moist-Fresh Woodland
Bur Oak Northern Tallgrass Moist-Fresh Savannah
Black Oak Tallgrass Moist-Fresh Savannah
Bur Oak Treed Alvar
Bur Oak-Shagbark Hickory Tallgrass Dry Woodland
Chinquapin Oak - Nodding Onion Treed Alvar Grassland
Chinquapin Oak Carbonate Treed Dry-Fresh Talus
Oak Treed Limestone Barren
Oak-Pitch Pine Mixed Dry Forest
Pin Oak-Bur Oak Tallgrass Moist-Fresh Savannah
Pin Oak Tallgrass Fresh-Moist Woodland
Pine Forests
Pitch Pine Treed Granite Barren
Imperiled (S2)
Upland Types
Basswood Forest
Basswood-White Ash-Butternut Moist Treed Limestone Talus
Black Walnut Forest
Black Walnut Moist-Fresh Deciduous Forest
Hemlock Forest

Hemlock-Sugar Maple Moist Limestone Talus
Oak Forest
Bur Oak Basic Treed Rock Barren
Bur Oak-Green Ash-Trembling Aspen Moist-Fresh Deciduous Forest
Bur Oak Saskatoon Berry Dry Deciduous Woodland
Chinquapin Oak-Pine Dry Mixed Forest
Wetland Types
Maple Forest
Red Maple-White Pine Mineral Mixed Swamp
Oak Forest
Pin Oak Mineral Deciduous Swamp
Shumard's Oak Mineral Deciduous Swamp
Swamp White Oak Mineral Deciduous Swamp
Pine Forest
White Pine-Coniferous Mineral Swamp
Vulnerable (S3)
Upland Types
Birch Forests
White Birch-Aspen Treed Limestone Cliff
White Birch Dry Treed Limestone Talus
Cedar Forest
White Cedar-White Spruce Philadelphia Panic Grass Treed Alvar Grassland
White Cedar Dry Treed Limestone Talus
White Cedar Treed Limestone Cliff
Hickory Forest
Bitternut Hickory Fresh-Moist Deciduous Forest
Hickory Dry-Fresh Deciduous Forest
Shagbark Hickory Fresh-Moist Deciduous Forest
Maple Forest
Sugar Maple-Black Maple Moist-Fresh Deciduous Forest
Black Maple Lowland Fresh-Moist Deciduous Forest
Sugar Maple-Ironwood-White Ash Treed Limestone Cliff
Sugar Maple Moist Treed Limestone Talus
Oak Forest
Mixed Oak Dry-Fresh Deciduous Forest
Black Oak Dry Deciduous Forest
Oak-Hickory Dry Deciduous Forest
Bur Oak Fresh-Moist Deciduous Forest
Hill's Oak-White Pine-Poplar Acidic Treed Rock Barren
Sassafras Forest
Sassafras Fresh-Moist Deciduous Forest
Wetland Types
Cedar Forest
White Cedar-Hemlock Coniferous Mineral Swamp
White Cedar-Hemlock Coniferous Organic Swamp

Maple Forest	
Red Maple-Hemlock Mixed Mineral Swamp	
Red Maple-Hemlock Mixed Organic Swamp	
Oak Forest	
Bur Oak Mineral Deciduous Swamp	
Pine Forest	
White Pine-White Birch Mineral Mixed Swamp	
Tamarack Forest	
Tamarack-Leatherleaf Treed Kettle Peatland	
Apparently Secure (S4)	
Cedar Forest	
Red Cedar Dry Coniferous Forest	
Maple Forest	
Maple-Yellow Birch-Hardwood and Mixedwood	
Sugar Maple-Basswood-Leatherwood Forest	
Sugar Maple-Hickory Dry-Fresh Deciduous Forest	
Oak Forest	
Oak-Maple Fresh-Moist Deciduous Forest	
Oak-Red Maple-Pine Basic Treed Rock Barren	
Oak-Sugar Maple Fresh-Moist Deciduous Forest	
White Oak Dry-Fresh Deciduous Forest	
Pine Forest	
Jack Pine Basic Treed Rock Barren	
Red Pine-White Pine Dry Coniferous Forest	

APPENDIX A – SITE OBSERVATIONS FORM (June 2019)

SITE CHARACTERISTIC	DESCRIPTION
TOPOGRAPHIC HABITAT DETERMINANTS (circle appropriate choice)	**1) slope position:** hilltop; upper slope; mid-slope; lower slope; valley; riparian **2) slope aspect:** N; NE; E; SE; S; SW; W; NW **3) slope steepness:** none/flat; low; medium; high
BEDROCK/SURFICIAL GEOLOGY (large slabs, boulders, jagged rocks, etc. - covered by moss/lichen?) – add notes	

EVIDENCE OF FIRE (e.g., fire scars on trees, burned foliage, burned logs, burned snags, charcoal in soils, other) – add notes	
ANIMALS (scat, bird/frog calls, tracks, sightings, insects, antlers, bones, etc.) – add notes	
GAPS IN OR NEAR PLOT (describe location (N, E, S, W), size, composition) – add notes	
WETLANDS (in or near plot - how close to plot? Type of wetland? Open water? Extent of wetland?)	
SNAGS AND LOGS ASSESSMENT FOR SURVEY LEVEL 1 (describe size, amount, decay level, and distribution relative to big tree)	
OTHER (impressions, rare or uncommon plant species, etc.)	