NMFWRI Riparian CSE-Based Plot Sample Protocols

Based on the 2011 Guidelines and Protocols for Monitoring Riparian Forest Restoration Projects (Bonfantine, et al.)
and the Common Stand Exam-based protocols used by NMFWRI for CFRP projects
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Crews, Navigation & Plot Setup

Plots are most efficiently accomplished with a **3-person crew** but can also be taken with 2 people. More detailed plots, presented here as options, are most efficient with a 4- to 5-person crew. All crews need basic knowledge of monitoring methods and rationale, equipment, plant species and common tree pests and diseases.

Plots are established using a random point location with project-specific boundaries e.g. stand boundaries, treatment areas, vegetation types, etc. In our office, maps and plot locations are generated with ArcGIS utilities and are loaded onto a Trimble and Garmin GPS units. **The sampling density scheme** for GRGWA projects is as follows:

Projects under 21 acres – 2 plots
21-50 – 1 plot per 10 acres
For projects 51+ acres:
51-70 ac --- 5 plots
71-90 ac --- 6 plots
91-110 ac --- 7 plots
111-200 ac --- 8-9 plots
201-400 ac --- 10 plots
400+ ac – discuss alternate sampling methods (e.g. LiDAR)

The plot minimum spacing is 300 ft on most projects, or 200 or 100 ft on projects where a 300 ft spacing will not allow the prescribed number of plots to fit within boundaries. Plots must be a minimum of min 50 ft from project boundary. Plots will be moved in a random direction towards the inside of project if plot lands less than 50 ft of boundary using "Create Random Points" in ArcMap. Note that within this framework, flexibility exists to add plots as needed to capture site diversity.

Unit maps, driving maps and driving directions are created and sent with the field crew. Once in the project area, **navigation** to a plot is typically accomplished through paper maps and the Garmin GPS units. Paper maps can be easily marked with Sharpies to indicate sequence of plot collection, dates, and teams at work; this information can be stored with the datasheets and may help answer questions that arise later. We use Garmin GPS units because they are user-friendly and can run on AA batteries which are easily replaced in the field. We use the Trimble unit to more accurately determine plot location and collect updated plot location coordinates which can later be post-processed for greater location accuracy with GPS Pathfinder Software. Plots must be moved one chain (66 ft) at a random azimuth from their original, intended location if they are within 75 feet of a road.

A marker (we typically use a 1-foot piece of ½ inch rebar with a mushroom cap) is installed at plot center if the landowner/manager gives permission. Markers should be low to the ground and well flagged so that they are obvious to managers and treatment contractors. Where plots are being re-

visited, a good metal detector may be of use to locate the center stake. Copies of the previous plot photos can also be useful.

Plots are set up using 8 pin flags in addition to the center stake. Crew members walk cardinal azimuths (N, E, S, W) from plot center and place pin flags at **11.78ft (11' 9") and 37.24ft (37' 3")** to give visual aids for the two plots (1/10th ac and 1/100th ac) whose purposes are described below.

Photographs, Witness Trees & Other Plot data

Eight **photographs** are taken per plot. If more than the two standard Brown's transect is collected, additional photographs are taken in the same format. Typically, a white board with marker is used to tag each photo. The first photo taken at each plot is of the white board on the ground at plot center ("PC"). This ensures the data technicians are able to read the plot name and number and correctly identify the photos that follow. It is helpful if the camera used can record GPS coordinates.

Additional photos include:

- "C," taken from 75 feet along the North azimuth looking at a crew member holding the white board at plot center
- Brown's transect photo, "B_*degrees*" taken from the 75-foot mark of each fuels azimuth looking towards a crew member holding the white board at plot center
- "N," "E," "S," and "W" photos taken from plot center facing a crew member holding the white board 37.2' at each of the four cardinal azimuth flags. Additional photographs may be taken, but we recommend these be taken after the mandatory eight plot photos, and noted on the data sheets, so that there is no confusion for the data technicians.

All plot photos except "PC" need to be documented in the **Photopoint Log**. The Photopoint Log provides places to document landmarks and other information about each photograph to make re-takes simpler.

A **witness tree** or trees should be near plot center to assist with finding plot center and ideally should be expected to survive any future thinning, fire, or other disturbance. For example, mature yellow-bark pines near plot center are easy to find and not likely to be thinned. Any healthy tree will work. The tree should be flagged, noted in the overstory data, and described on the Plot Description datasheet.

Photo order, hill slope, dominant aspect, coordinates, elevation, date, and **time** are recorded for each plot. **Comment fields** are available on all datasheets and we encourage all observations, including species, land use impacts, fire history, challenges in taking plot, etc. to be documented here.

Overstory

All **trees and snags** are measured within the 1/10th acre plot (37.24 ft. radius) circular, fixed area sample plot. We typically define a tree as ≥ 4.5 ft. and > 5 in dbh or drc, although other cutoffs may be used depending on objectives. Species, condition, dbh or drc, number of stems, total height, and live crown base height are recorded for each tree located within the plot. Most trees are measured at dbh with exception of *Quercus* spp., *Juniperus* spp. or *Pinus edulis* species with more than two stems at dbh. Be aware that other trees/large shrubs with multiple stems, such as saltcedar, Russian olive, mountain mahogany or chokecherry, cannot be processed if they are measured at drc since their conversion

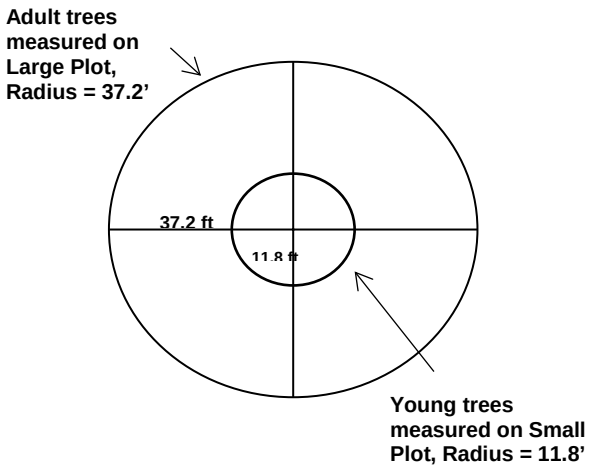
formulas are unavailable. Depending upon the project, other information may be collected including damage and severity, scorch height, snag decay class, crown ratio, and crown class. Trees are recorded starting from the north azimuth line and moving clockwise, like spokes of a wheel from plot center. In dense stands, we find it helpful to flag the first tree measured to keep the crew oriented. If appropriate, this first tree may also serve as the **witness tree**. Do not forget to flag and record your witness tree.

Tree regeneration is measured on the nested 1/100th acre circular plot (11.78 ft. radius) and species, condition, and height class (>0-0.5 ft; >0.5-1.5ft; >1.5-2.5ft; >2.5-3.5ft.; >3.5-4.5ft) are recorded for each **seedling** or sprout. **Saplings** (>4.5ft but <1.0in dbh/drc) are also recorded in this way. **Shrubs** are measured on the same nested subplot and species, condition and height/diameter class are recorded for each stem just as with tree species; we typically record cacti in this category as well. Other cutoffs may be used for height and diameter classes depending upon objectives.

Trees and shrubs are typically recorded using their **USDA PLANTS code**, which is commonly a four letter code defined by the first two letters of the genus and first two letters of the species name (e.g. PIPO, ABCO, PIFL, PIED, JUDE, JUSC, QUGA, etc). Note that upon entry into a database, it is common for these codes to be followed by various numbers in order to differentiate between other species whose names would create the same code. These symbols can be found on the USDA PLANTS website, https://plants.usda.gov/

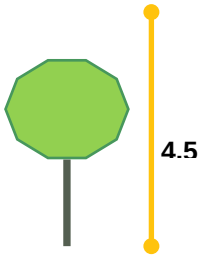
Canopy cover (density) is an average of four measurements from a spherical densiometer. These four measurements are taken facing out at the four small-plot pin flags along the perimeter of the nested subplot. In this way, each reading is spaced 90 degrees apart. Each of the four measurement is recorded separately on the datasheet. The crew should be sure to count dots, not squares, and always record the area covered, not open.

Vegetative Community Structure type is a classification system developed by Hink and Ohmart to describe patterns of vegetation specifically along the Middle Rio Grande. The **"original" Hink and Ohmart** scheme uses vegetation height and presence of understory vegetation to assign a structure type between 1 and 6. In addition, the New Mexico Environment Department developed a **"modified" Hink and Ohmart** system that assigns a value of 1, 2, 5, 6S, 6W, 6H or 7. We recommend the field crews take copies of the keys for both original and modified schemes and apply them to the entire 1/10th acre plot.



Tree Regen:

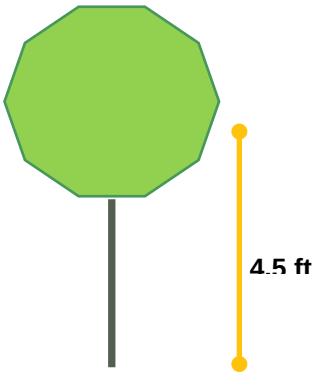
< 4.5’ tall OR
>4.5’ but <5” dbh



Adult trees:

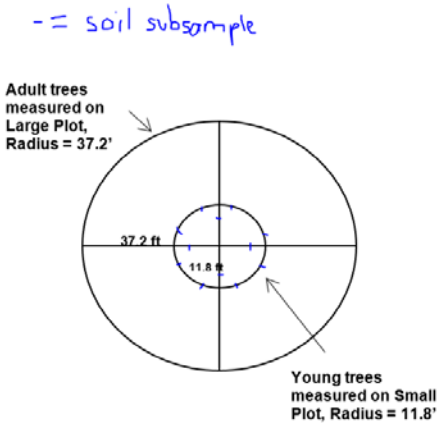
> 4.5’ tall

> 5” diameter



Soils

At this time, **soil texture** is collected in four locations. At each of the four 1/100th acre cardinal direction flags, collect 3 subsamples of soil using a shovel or soil corer to a depth of 6 inches. Standing over the flag as if taking canopy cover, i.e. facing away from plot center in the cardinal direction of the flag, you will collect soil subsamples 2 feet to the left, right and immediately behind you as illustrated below.



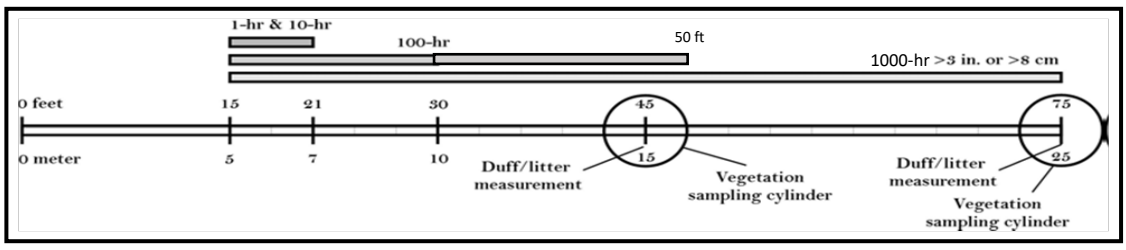
Combine each set of three subsamples into one sample by mixing thoroughly in a bag or tub. Remove any large organic debris such as plants or wood chips. Follow the soil texture flow chart to determine soil texture for each combined sample at each measurement point. Record this on the datasheet for a total of four soil textures per plot. Return soil to all holes when sampling is complete.

Fuels (Brown's)

Dead woody biomass and forest floor depth are measured using two planar Brown's transects. These are at random azimuths. To select a random azimuth, one crew member spins a compass and another decides when to stop. Typically in our protocol, a fiberglass tape is run from the plot center stake out 75 feet and fuels are measured from 15 to 75 feet to account for the expected foot traffic disturbance around plot center. Parameters measured include **1, 10, 100, and 1,000 hour fuels** ("time-lag fuels"). See diagram below for standard lengths of various transects.

For full protocol details, see Brown 1974 and subsequent guidelines or the NMFWRI training manual. Quick reminders: Note that in our protocol, a piece of coarse woody debris (CWD) must be >3" in diameter and at least 3 feet long to count as a 1000-hour fuel; if it is >3" in diameter, but under 3 feet long, we count it as a 100-hour fuel. Decay class (1 to 5) and sometimes length is collected for each 1000-hour fuel. The comment field on the datasheets is often used to record species and how the log came to be on the ground, when discernable. The sampling plane goes up to 6 ft above the transect. Rooted vegetation does not count unless it has a lean over 45 degrees.

Litter and duff depth measurements are taken at 45 feet and 75 feet on each transect.



Understory Cover

Vegetation and ground cover are estimated across the entire 1/10th acre plot. Vegetation measurements include **aerial percent cover** of seedling/saplings, shrubs (including cacti), graminoids, and forbs, and may not necessarily total 100%. Aerial percent should be further stratified by individual species greater than 1% cover. USDA PLANTS codes are preferred. The status of each group of vegetation (live, dead, sick) as well as the nativity (Native, Exotic, Both, or Unknown) should be recorded. Any unknown plants should described in comments, photographed (after plot photos!) and samples collected in a field press for subsequent identification. We strongly recommend the inclusion of sticky notes with each pressed sample describing the collection location and conditions, including the plot.

Ground cover measurements include percent cover of plant basal area (including cacti), boles, litter, bare soil, rock, gravel, and water/wet soil and must total 100%.

Data processing and reporting

At this time, we use **FFI software**, as well as Excel spreadsheets, to enter and analyze our data. FFI is able to export to FVS and FuelCalc. FFI software and User Guides are available for download here: https://www.frames.gov/partner-sites/ffi/software-and-manuals/

In order to process individual piñons, junipers and oaks with more than 2 stems or whose branch structure made access difficult and were therefore measured at root collar (DRC) instead of breast height (DBH), we use the **equations developed by Chojnacky and Roger** (1999).

All our results are typically reported to two significant digits, with exceptions for those metrics we know were measured with either more or less precision.

Sample reports can be found on our website: http://nmfwri.org/resources/restoration-information/cfrp/cfrp-long-term-monitoring/cfrp-long-term-monitoring

And

https://www.nmfwri.org/collaboration/greater-rio-grande-watershed-alliance

GRGWA Plot Description (1 of 2)

Observer: _____

Recorder: _____

Latitude (dd.dddddd): _____

Longitude (ddd.ddddd): _____

Elevation (ft): _____

Administrative Unit: _____

Project Unit: _____

Macroplot: _____

Date (DD/MM/YYYY): _____

Time: _____

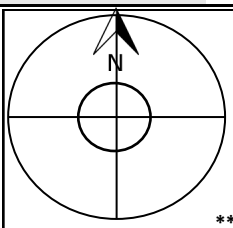
Macroplot Sizes		
Size (Acres)	1/100	1/10
Radius (Feet, Decimal Feet)	11.78	37.24
Radius (Feet, Inches)	11' 9"	37' 3"

Hill Slope (where steepest): _____%

Aspect (circle one): N E S W

Aspect azimuth: _____°

Mag Declination: _____°



Describe Witness Tree(s):
USE NATIVE TREES ONLY

****Draw location of tree on plot****

Color of Flagging Used: _____

Photo Azimuths: (1) of whiteboard at PC. (1) from 75 feet N looking south to PC (4) from PC in all four cardinal directions; (1) from each Brown's transect looking toward PC.

ORDER TAKEN: _____

Comments/Description of Plot:

Tree Canopy Cover (%) (densiometer)

_____+_____+_____+_____

Hink & Ohmart Dominant Structural Class

Original:

Modified:

Soil Texture (4 locations)

North:_____

East:_____

South: _____

West: _____

****SMALL PLOT INCLUDES ALL SEEDLINGS OR SAPLINGS <5 INCHES DBH/DRC.****

Species	Condition (Live, Dead, Sick)	Small Plot (1/100th Acre only) - Tree Regen, Shrubs & Cacti — Height classes—Seedlings (feet)				
		> 0 - 0.5'	> 0.5—1.5'	> 1.5' - 2.5'	>2.5' - 3.5'	>3.5' - 4.5'

Species	Condition (Live, Dead, Sick)	Small Plot (1/100th Acre only) - Tree Regen, Shrubs & Cacti — Diameter classes—Saplings (inches)				
		> 0 - 1"	>1-2"	>2-3"	>3-4"	>4-5"

New Mexico Forest and Watershed Restoration Institute

Plot Description Version: 4/3/2018, km

Precisions:

Slope:		**±5 percent**
Vegetation cover	:	**±1 class estimation or ±10%**

GRGWA Plot Description (2 of 2)

List by Species	Status (L, D, S)	Nativity: N, E, I, Unk?	AERIAL COVER (%) (ENTIRE 1/10th acre plot)				
			Estimate Aerial Cover % for Species by Lifeform				
			Tree	Shrub	Forb/herb	Gramanoid	Cactus
TOTALS							

GROUND COVER (%) (ENTIRE 1/10th acre plot) (must total 100 %)							
Plant basal	Bole	Litter	Bare soil	Rock (>2.5in)	Gravel (< 2.5 in)	Water, Wet Soil	Total (%)

Comments on Species Composition and/or Ground Cover:

GRGWA Surface Fuels

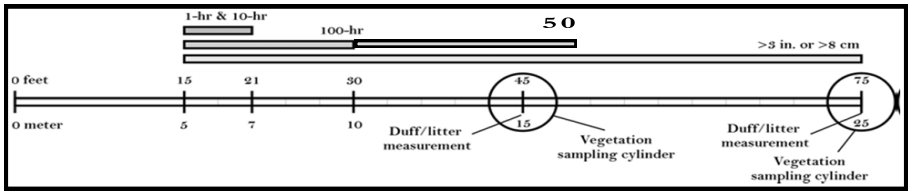
Sheet 1 of 1: Fine Woody Debris—Coarse Woody Debris

Observer	_____
Recorder	_____

Administrative Unit:	_____
Project Unit:	_____
Macroplot:	_____
Date (DD/MM/YYYY):	_____
Time:	_____

1-hour Transect Length - 6'	**10-hour Transect Length - 6'**
100-hour Transect Length - 35'	**1000-hour Transect Length - 60'**

Class		Diameter (in)
FWD	**1-hr** **10-hr** **100-hr**	**0 to 0.25** **0.25 to 1.0** **1.0 to 3.0**
CWD	**1000-hr and greater**	**3.0 and greater**



Fine Woody Debris (1, 10, 100 hr fuels)	Transect	Azimuth	Slope	1 - Hr Count	10 - Hr Count	100 - Hr Count	Comment
	1						
	2						

Coarse Woody Debris (1000 hr fuels)	Transect	Slope	Log No.	Log Diameter	Decay Class	Comment

Litter & Duff	Transect 1	45'	75'	Transect 2	45'	75'
	Litter Depth (in)			**Litter Depth (in)**		
	Duff Depth (in)			**Duff Depth (in)**		
	Comments?			**Comments?**		

Precisions: Diameter: ±0.5 in ; decay class ±1 class ; Slope ±5 percent

Decay Class Description

1 All bark is intact. All but the smallest twigs are present. Old needles probably still present. Hard when kicked

2 Some bark is missing, as are many of the smaller branches. No old needles still on branches. Hard when kicked

3 Most of the bark is missing and most of the branches less than 1 in. in diameter also missing. Still hard when kicked

4. Looks like a class 3 log but the sapwood is rotten. Sounds hollow when kicked and you can probably remove wood from the outside with your boot. Pronounced sagging if suspended for even moderate distances

5. Entire log is in contact with the ground. Easy to kick apart but most of the piece is above the general level of the adjacent ground. If the central axis of the piece lies in or below the duff layer then it should not be included in the CWD sampling as these pieces act more like duff than wood when burned.

GRGWA Trees

Observer/Recorder: _______________ **Project/Site/Plot**____________________ **Date**_________________

	1/10th acre plot (37’ 3’’ radius)								
Tree #	Species	Tree cond.	DBH	DRC	No. stems	Total Tree Ht	LiCrBHt	Mistletoe (%)	Comments damage/disease, witness tree, etc.

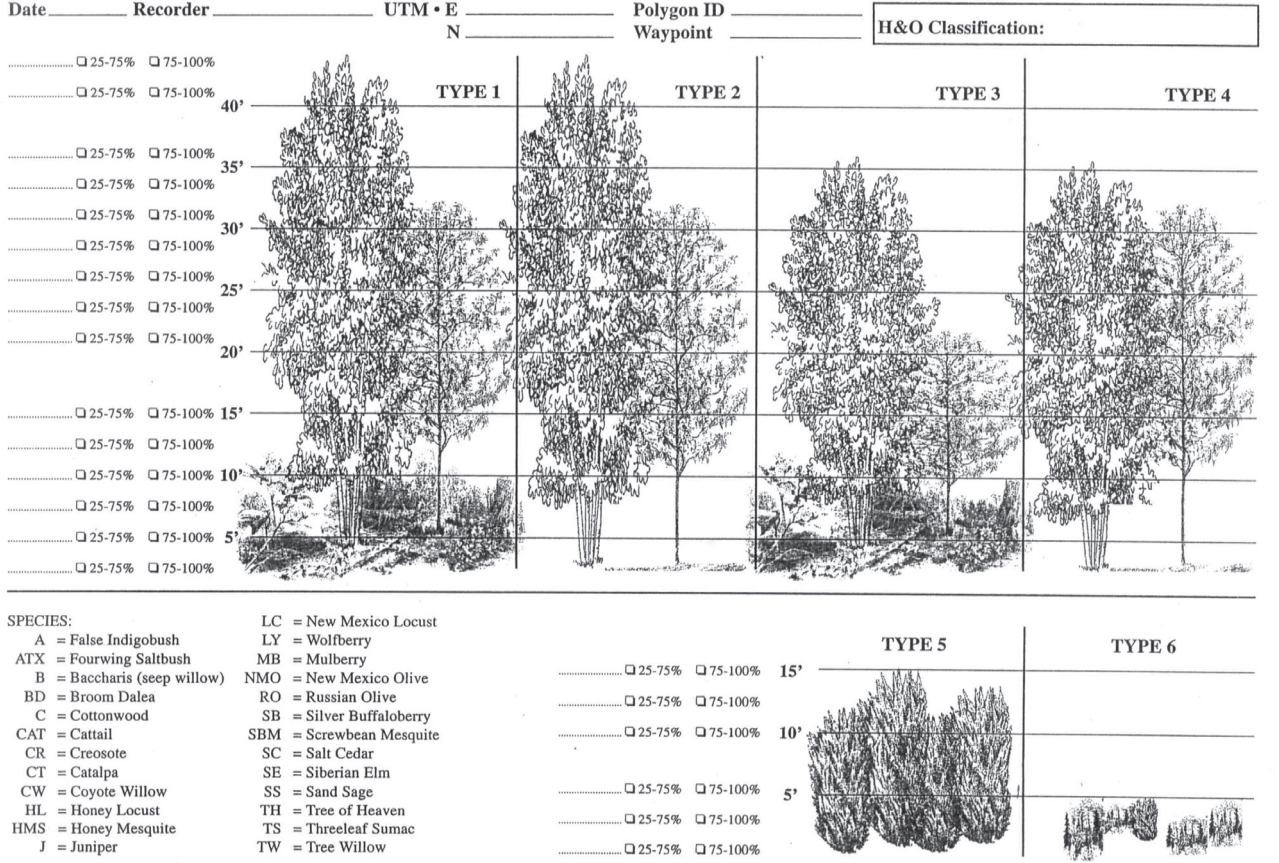


FIGURE 5. STRUCTURAL CLASS WORKSHEET (SWCA 2006) BASED ON HINK AND OHMART (1984)

Vegetation Vertical Structure Type Definitions for NMRAM

Multiple-Story Communities (Woodlands/Forests)

Type 1 – High Structure Forest with a well-developed understory.

Tall mature to intermediate-aged trees (>5 m [>15 feet]) with canopy covering >25% of the area of the community (polygon)and understory layer (0–5 m [0–15 feet]) covering >25% of the area of the community (polygon). Substantial foliage is in all height layers. (This type incorporates Hink and Ohmart structure types 1 and 3.) Photograph on Gila River by Y. Chauvin, 2012.

Type 2 – Low Structure Forest with little or no understory.

Tall mature to intermediate-aged trees (>5 m [>15 feet]) with canopy covering >25% of the area of the community (polygon) and understory layer (1–5 m [3–15 feet]) covering <25% of the area of the community (polygon). Majority of foliage is over 5 m (15 feet) above the ground. (This type incorporates Hink and Ohmart structure types 2 and 4.) Photograph on Diamond Creek by Y. Chauvin, 2012.

Single-story Communities (Shrublands, Herbaceous and Bare Ground)

Type 5 – Tall Shrub Stands.

Young tree and shrub layer only (1.5–5 m [4.5–15 feet]) covering >25% of the area of the community (polygon). Stands dominated by tall shrubs and young trees, may include herbaceous vegetation underneath the woody vegetation. Photograph on San Francisco River by Y. Chauvin, 2012.

Type 6S – Short Shrub Stands.

Short stature shrubs or very young shrubs and trees (up to 1.5 m [up to 4.5 feet]) covering >10% of the area of the community (polygon). Stands dominated by short woody vegetation, may include herbaceous vegetation underneath the woody vegetation. Photograph on Lower Pecos River by E. Lindahl, 2008.

Type 6W – Herbaceous Wetland.

Herbaceous wetland vegetation covering >10% of the area of the community (polygon). Stands dominated by obligate wetland herbaceous species. Woody species absent, or <10% cover. Photograph of *Carex nebrascensis* meadow on upper Rio Santa Barbara by Y. Chauvin, 2009.

Type 6H – Herbaceous.

Herbaceous vegetation covering >10% of the area of the community (polygon). Stands dominated by herbaceous vegetation of any type except obligate wetland species. Woody species absent or <10% cover. Photograph on Diamond Creek by Y. Chauvin, 2012.

Type 7 – Sparse Vegetation/Bare Ground.

Bare ground, may include sparse woody or herbaceous vegetation, but total vegetation cover <10%. May be natural in origin (cobble bars) or anthropogenic in origin (graded or plowed earth) Photograph on Lower Gila River by Y. Chauvin, 2012.

GRGWA Project Photopoint log											
Project (e.g. 19-01)	Date & Time	Photopoint ID (format: 19.01_1_NESW)	Lat (dd.ddd)	Long (ddd.ddd)	Direction Facing (N, E, S, W)	Foreground Landmark: Description Distance, Bearing, Flagging color	Background Landmark: Description, Distance, Bearing	Whiteboard Distance (usu. 11.78 ft if standalone PP 37.24 ft if part of plot	Camera Used (e.g. red olympus, black ricoh)	Field Crew Initials	Comments/ Veg polygons

Soil Texture by Feel Flow Chart

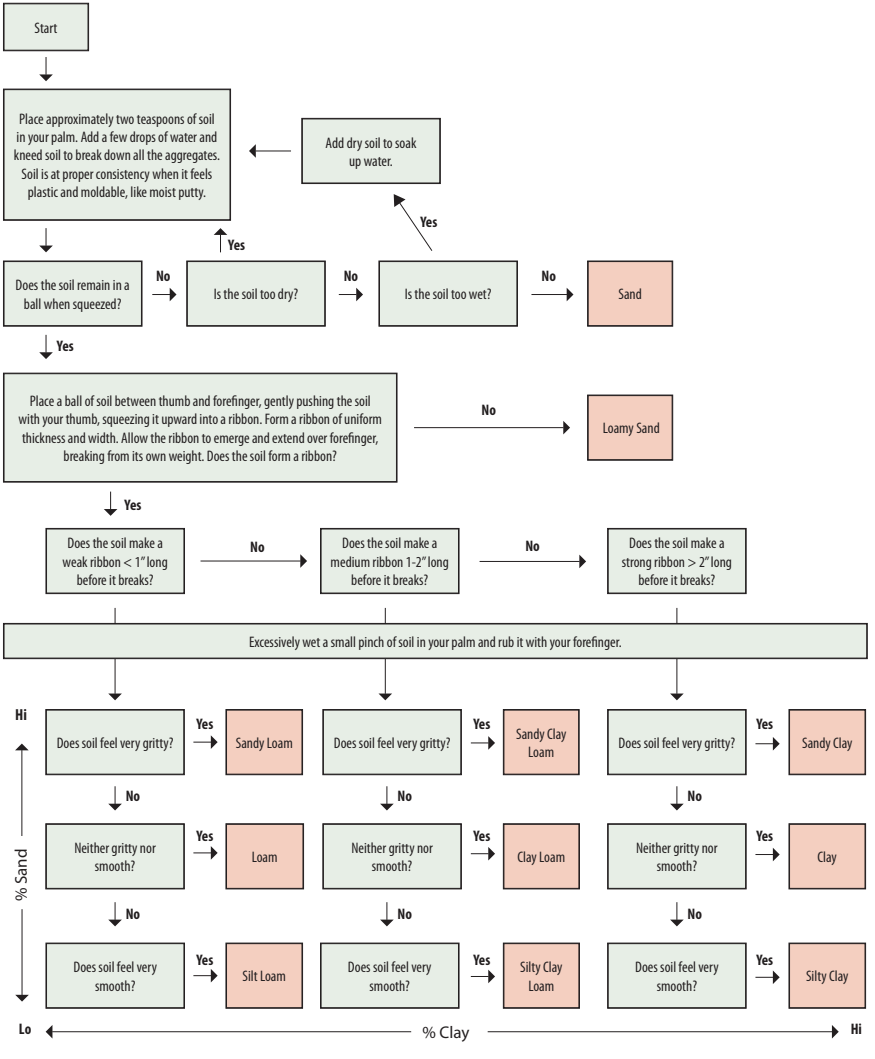


FIGURE 16. SOIL TEXTURE BY FEEL (THIEN 1979)

Materials Needed

• water • squirt bottle • texture by feel instruction sheet • distilled water