Relevant Literature Notes

Methods

Site Description

The study was conducted in the 25.6-hectare Large Forest Dynamics plot at the National Zoo and Conservation Biology Institute in Front Royal, Virginia (38° 53’36.6“N, 78° 08’43.4 “W). The plot, which is located in the central Appalachian Mountains adjacent to Shenandoah National Park, is composed of secondary eastern mixed deciduous forest. Situated in the Appalachian Oak forest region, the canopy is dominated by tulip poplar (*Liriodendron tulipifera*), oak (*Quercus spp*.), and hickory (*Carya spp.*) and the understory is primarily composed of spicebush (*Lindera benzoin*), paw-paw (*Asimina triloba*), American hornbeam (*Carpinus carolinianai*) and witch hazel (*Hamamelis virginiana*) (SCBI site description). The land-use history of the site is varied, including periods of agricultural development and intensive logging, with dendrological data estimating canopy tree establishment around 1900 (SI archives, Bourg et al. 2013). Natural disturbances at the plot consist of wind and infrequent ice storms (Anderson-Teixiera 2015). The plot, which includes a 4-hectare deer exclosure that has decreased the presence of deer since 1990, is divided into 640 quadrats, each measuring 20 x 20 meters. It is one of 78 sites in the Forest Global Earth Observatory (ForestGEO), a global network of forest dynamic plots that promotes comparative forest ecology studies around the World.

ForestGEO Census

A number of surveys are regularly conducted at the site, four of which are included in our analysis. As part of the ForestGEO network, the plot undergoes a comprehensive woody plant inventory every five years, according to the protocol outlined in Condit (1998). This inventory, hereby referred to as the census, includes all stems greater than 1 centimeter in diameter at 1.3 meters in height (referred to as diameter at breast height or dbh). The census records information regarding the dbh, species, status and location of each stem included in the survey. Each plant is assigned an identifying number for sequential data collection in subsequent censuses and outfitted with a metal tag in the field. For multi-stemmed individuals, each additional stem that surpasses the 1 cm dbh threshold receives a stem number and associated tag. The location of each individual within its respective 20 x 20 meter quadrat is recorded on a map of the plot on ArcGIS FieldMaps. Established in 2008, there have been 4 censuses at the site, comprising 20 years of detailed forest dynamics data.

\*Is dbh considered common knowledge? Does it need to be defined?\*

\*Check with Luca to use consistent terminology here and in the analysis portion of the methods for ID tag, stem tag, etc.\*

A number of surveys are regularly conducted at the site, four of which are included in our analysis. As part of the ForestGEO network, the plot undergoes a comprehensive woody plant inventory every five years, according to the protocol outlined in Condit (1998). This census, which includes all stems greater than or equivalent to 1 centimeters in diameter at 1.3 meters, records information regarding the status, species, diameter at breast height and location of each stem. Each plant is assigned an identifying number for sequential data collection in subsequent censuses and outfitted with a metal tag in the field. For multi-stemmed individuals, each additional stem that surpasses the 1 cm dbh threshold receives a stem number and associated tag. The location of each individual within its respective 20 x 20-meter quadrat is recorded on a map of the plot on ArcGIS FieldMaps.

Mortality Survey and Invasive Species Survey

In addition to the ForestGEO census, an annual mortality survey is conducted on the site. Through assessing individual tree health, this study illustrates trends in forest mortality and identifies factors that are associated with death. Data is collected on the current status, canopy position, percentage of crown living and intact, and visible indicators of poor tree health, such as physical damage, potential pathogens and insect infestation. Furthermore, an invasive plant survey is conducted in conjunction with [the mortality survey or the census]. This study evaluates the establishment of non-endemic plant species and patterns of spatial distribution. Quadrats are visually examined for non-endemic plant species, with an estimation of the area covered by each species represented on a 1-5 numeric scale.

\*Is the invasive plant survey conducted every year or every five years?\*

Notes

* Located in the Oak Chestnut forest region (SCBI Github)
* Located at the intersection of the Blue Ridge, Valley and Ridge and Piedmont physiographic provinces (SCBI Github)
* Annual mean temp of 12 C° (SCBI Github)
* Annual precipitation of 1001 mm (SCBI Github)
* Elevation ranging from 273 to 338 meters, with a topographic relief of 65 meters (SCBI Github)
* Composed of secondary eastern deciduous forest (SCBI Github)
* Biome class of Cfa (humid subtropical/mid-latitude with significant precipitation all year) (SCBI Github)
* Natural disturbances consist of wind and ice storms (Anderson-Teixeira 2015)
* 640 20 x 20 meter plots
* Land use includes agriculture and logging (SI Archives)
* Most canopy trees were established circa 1900 (Bourg et al. 2013)

References

SCBI site description (Github)

<https://scbi-forestgeo.github.io/SCBI-Plot-Book/physical-environment.html>

Bourg et al. 2013

<https://www.researchgate.net/publication/257296875_Initial_census_woody_seedling_seed_rain_and_stand_structure_data_for_the_SCBI_SIGEO_Large_Forest_Dynamics_Plot>

SI Archives

<https://siarchives.si.edu/history/smithsonian-conservation-biology-institute-scbi>

Anderson-Teixeira 2015

Anderson‐Teixeira, Kristina J., Stuart J. Davies, Amy C. Bennett, Erika B. Gonzalez‐Akre, Helene C. Muller‐Landau, S. Joseph Wright, Kamariah Abu Salim, et al. 2015. “CTFS-ForestGEO: A Worldwide Network Monitoring Forests in an Era of Global Change.” Global Change Biology 21 (2): 528–49. <https://doi.org/10.1111/gcb.12712>.

Recruitment Failure

Outline

* Nuisance species have a profound impact on regional ecosystems
* There is a documented overabundance of white-tailed deer (*Odocoileus virginianus*) (*Publication referenced in McGravey et al. 2013*) which can be attributed to human influence (*Publication referenced in McGravey et al 2013*)
* White-tailed deer consume seedlings and saplings, negatively impacting seedling and sapling survival, density and growth (*Publications referenced in McGravey et al. 2013*, *Holm et al. 2013*)
* This can lead to decreased understory diversity, decreased canopy diversity and species richness and decreased abundance of dominant species in a typical forest (in this case Quercus spp.) (*Holm et al. 2013*)
* Define or contextualize non-endemic plants (Look for a reference)
  + Working definition: Plants that were not historically present in an area, region or ecosystem or were found at different abundances or densities
* Deer selectively browse on palatable species, and some non-endemic species, including pawpaw, are considered non-palatable by deer (*McGravey et al. 2013*) This can create dense stands of non-endemic species (*Knauer et al. 2023*)
* Non-endemic species may be able to utilize niche space in a forest faster or more efficiently (Reference - considered common knowledge?)
* As a result, they may be able to out compete endemic species
* These nuisance species can contribute to recruitment failure
  + Consider defining and contextualizing recruitment failure a little more here
  + The effects of these recruitment failure on species composition and forest structure are often not apparent for decades (*McGravey et al. 2013* - potentially move to regeneration debt paragraph).

Recruitment Failure Literature

McGarvey et al. 2013

* Chronic over-browsing by white tailed deer can influence the life history of forests
* Deer browsing had the greatest effect on seedling establishment
* Browsing has an effect with smaller stems and saplings, but less of an effect on larger stems
* The effects of deer browsing might not be apparent in species composition and forest canopy for decades
* An increase in white deer over the past 50 years, which can be attributed to human influence
* Deer browsing reduces seedling survival rates and densities
* Deer selectively browse on palatable species
* Some non-endemic species, including pawpaw, are considered to be unpalatable to deer
* Seedling height and small-sapling abundance were most effected

Knauer et al. 2023

* Heavy browsing by deer reduces palatable species, which can create ideal conditions for dense stands of unpalatable native, non-native and browse-resistant stands to form
* Removing deer for long periods of time (8-20 years) does not lead to increased species diversity (in the understory?); the understory remains depauperate (poorly or imperfectly developed)
  + Once browsing has reduced species to low levels of abundance, it can take decades for them to recover
* Browsing can lead to species being extirpated or be sparsely distributed locally or regionally
* Many forest understories, especially in urban-fringe forests, and infested with non-endemic plants

Holm et al. 2013

* In a model predicting the effects of deer browsing on forest composition in 200 years, deer browsing decreased understory diversity, decreased species richness and decreased the abundance of Quercus spp. (a dominant species in this forest type)
* Gap disturbances exacerbated these impacts (could tie into paragraph on non-endemic pests and pathogens and tree mortality)
* Deer browsing can reduce survival and growth of several woody species and change the dominance rank of species at the sapling stage
* Impacts of browsing are likely to be greater in areas with high gap disturbance
* Deer herbivory on saplings reduced tree diversity in the understor

*Read this source for pawpaw life history traits – potential reference*

Intensive Selective Deer Browsing Favors Success of *Asminia trloba* (Paw paw) a Native Tree Species

*Cut-out sentences*

White-tailed deer preferentially browse on woody herbaceous species in their earliest life stages (Reference), with overabundant herbivory negatively impacting seedling and sapling survival, growth and density (Reference). Long-term/chronic overabundance could contribute to decreased understory diversity and fewer individuals from traditionally dominant species (Reference)./ Models predict that chronic overabundance will reduce understory diversity and decrease the abundance of traditionally dominant species (Reference)./Models of mid-Atlantic mesic forests predict that chronic overabundance of white-tailed deer will reduce future understory diversity and decrease the abundance of traditionally dominant species (Reference).