

## **Procedures for updating Parent Tree and Lot Information**

November 2007

### **Introduction**

These procedures outline the roles and responsibilities of Tree Improvement Branch and Research Branch in managing parent tree and lot information, and the steps necessary to enter, update and confirm new parent tree breeding values and tested areas of use in a timely and coordinated manner. Furthermore, these procedures outline the steps for notifying clients and updating lot information. These procedures do not cover every possible situation, and will be updated over time as experienced is gained.

These procedures are intended to be consistent with the [Chief Forester's Standards for Seed Use](#) and the [Chief Forester's Policy on Parent Tree Information](#) (June 1, 2005). However, where a discrepancy exists between these procedures and the standards and policy, the latter shall prevail.

### **Roles and Responsibilities**

Forest Genetics Section, Research Branch (RB) is responsible for:

- selecting and testing parent trees for specific traits in one or more areas of use;
- determining and verifying parent trees' tested area of use, and breeding values (BV) and clonal values (CV) in accordance with generally accepted scientific methodology;
- maintaining information regarding a parent tree, including information about its pedigree, trials and sites where the parent tree is tested and
- submitting parent tree information for tested and untested parent trees in accordance with Sections 5.3 and 5.4 of the standards

Tree Improvement Branch (TIB) is responsible for:

- registering seedlots and vegetative lots in accordance with the standards and maintaining lot information in the Seed Planning and Registry system (SPAR);
- maintaining parent tree information for parent trees contributing to registered seedlots and vegetative lots in SPAR;
- confirming new parent tree information is complete and consistent with the standards;
- notifying orchard managers and seedlot owners of changes to parent tree information and affected lots;

**Procedures for entering, updating, and confirming Parent Tree information:**

1. RB staff informs the Manager, Forest Genetics, of new additions or updates to tested areas of use and/or BVs/CVs and provides supporting information and analysis.
2. The Manager reviews the BVs/CVs and that the new information was determined in accordance with generally accepted scientific methodology.
3. If approved, RB staff enters the parent tree information required under section 5.3.2 of standards into the applicable Parent Tree screens in SPAR (i.e., source information, areas of use, tests, BV / CV values).
4. RB staff notifies the Manager that entry of the parent tree information has been completed.
5. The Manager sends an email to the Seed Information Systems Officer (SIO), TIB, confirming that new parent tree information for a species and seed planning unit (e.g. new identification numbers, BV/CV's or area(s) of use information) have been entered into SPAR.
6. The SIO will then confirm if the parent tree information entered into SPAR is complete and consistent with the standards. If so, the SIO will change the flag in SPAR for the applicable parent tree information changes to "approved". If the information is not complete or consistent with the standards, the SIO will inform the Manager.

**Procedures for updating notifying clients and updating seedlots**

1. If the parent tree additions or changes are confirmed, the SIO will send an email note to the applicable orchard managers and the TSC Inventory Management Supervisor (IMS) notifying them of the changes. The date of the email shall be recorded as the "release date" of the new information.
2. The IMS will then identify all active and expired lots collected from those parent trees that have new BVs or area of use, and estimate the date which changes will be made to affected seedlots in SPAR.
3. The TSC will then send a note to all SPAR clients informing them of pending changes to lots derived from the parent trees – by species and seed planning unit – and identify the approximate date that these changes will be made in SPAR.
4. The IMS will use the 'recalculate' function in SPAR to recalculate and save the new GW values for each active and expired lot for which parental contribution information exists in SPAR. Changes to lot GWs and areas of use will be recorded in the Seedlot Detail Report.
5. The GW for lots with no parental contribution information in SPAR will not be changed. However, the IMS may invite the applicable orchard manager to submit the parental contribution information for a lot to enter into SPAR in order to recalculate the lot's GW.
6. A chronology of parent tree information changes, by species, SPU and release date will be posted on TIB's website.

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