

DOCUMENTING RARE BIRDS – A NEW YORK PERSPECTIVE

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Many people think that if the members of a records committee believe a sighting, then it will be automatically accepted. Thus, the thinking goes, if an experienced birder writes up a rare bird, his or her report has a better chance of being accepted than one submitted by a less experienced birder. Along the same vein, if Joe Birdpro, one of New York's top birders, identifies a bird, then it will be accepted purely because he said it was so. Or, if a rare bird is reported all over the Internet and has been for weeks, then it is a done deal. Not necessarily!

First of all, the records committee needs to receive a report. Without it, there can be no record. Many sightings believed to be correct are lost simply because no report was ever submitted. Secondly, the report will be judged on the quality of the documentation, not on who the observer is. *This cannot be over emphasized!* Thus, if a report is submitted carelessly, with the assumption that acceptance will be automatic, the record most likely will be in jeopardy. The birder who has seen her life LeConte's Sparrow and who does a thorough detailed report is much more likely to have the report accepted than the vastly more experienced birder who by contrast, jots down a few "key" characters but who does not even provide sufficient detail to establish that the bird was in fact a sparrow!

All this is not to say that experience counts for nothing. However, it in no way replaces the need for as complete a description as possible. The records committee may well believe a sighting to be correct but they still need to receive adequate documentation in order to accept it. Remember, the reports are archived for future researchers who may have no knowledge of the observers' skills.

What is Documentation?

As used here, documentation is evidence in support of an occurrence of a species, whether it is an individual or a flock, at a particular time and place in New York State. This evidence can take many forms but should minimally include a written report by the observer giving the circumstances of the sighting and a description detailing exactly what field marks, etc. were seen. Other evidence may include the observer's field notes or field sketches, photographs, video, tape recordings, measurements (birds in the hand, typically for banding), or a specimen. Even feathers, pellets, or casts of footprints can provide supporting evidence.

There have already been some excellent articles written on the subject of documenting rarities. "How to Document Rare Birds" by Donna Dittman and Greg Lasley (1992) is a very thorough account that I highly recommend. The article originally appeared in *Birding* (Vol. 24, No. 3) and is now available through the New York State Avian Records Committee's (NYSARC's) web site:

<http://www.birds.cornell.edu/fnysbc/NYSARChome.htm>. In order to provide a background for some of the discussion to follow, it is appropriate to briefly summarize the major points of Dittman and Lasley's article:

1. take field notes and do field sketches
2. photographs and tape recordings usually are the best means for birders to provide tangible proof of a bird's occurrence
3. the written report is the foundation of the submitted documentation, even for those reports also well supported by photographs or tape recordings
4. look beyond the "Peterson" field marks and describe the entire bird, including behavior and vocalizations
5. written reports should not only include a thorough description but should also include comments on how similar species were ruled out

Field Notes and Sketches

"Written documentation provides the foundation for non-specimen records including those well supported by photographs or tape recordings." (Dittmann and Lasley 1992). The importance of taking field notes, therefore, cannot be over emphasized. The best way is to record them while the bird is under observation or immediately after it is lost from view. The longer you wait to take notes, the more the details will become lost or hazy in your memory. The unfortunate truth is that birders taking field notes where I bird (western New York and adjacent Ontario) are almost as rare as the birds they are chasing! It is true that notes taken when you get home are much better than those written the next day. However, notes taken on the spot or back at your car, *i.e. in the field*, invariably are superior.

Field notes should include as many details as you definitively observe. Field sketches are a great way to convey a large quantity of information. They should be annotated with notes and arrows pointing to the appropriate part of the bird, indicating those features which were consciously observed. Field notes do not have to be neatly printed and field sketches certainly do not need to be done by an artist. They should, however, be included with your report. Field notes constitute original data and should always be saved, no matter how messy or dirty they become. If legibility is a problem, provide a key explaining your scribbled comments or transcribe your notes at home.

Field notes should always be written before consulting a field guide. The human mind is an amazing tool but it is also easily deceived. After consulting the field guide, field marks you did not even see may suddenly seem obvious! So, even when a bird is under view for an extended period, it is preferable to take field notes before looking at the plate. While keeping your nose out of the field guide may seem extreme, it provides two important advantages. One, it maximizes the time spent actually studying the bird and two, it keeps the observer as objective as possible. Therefore, he or she can concentrate exactly on what is observed in the field without being unduly prejudiced by what the field guides say *ought* to be seen.

The Description

The description is the single most important element in most rare bird reports. Size, shape, plumage, soft parts (legs, bill, eyes, and areas of exposed skin), vocalizations, and behavior should all be included.. A complete description is the result of careful study in the field. Look at every part of the bird and only record what you actually see. A familiarity with bird topography, shown in the front of all field guides, is helpful not only for clarity in your report but also as a reminder to look at all parts of your rare bird.

Many reports focus on the plumage, often neglecting the equally important features of size and shape. One recent NYSARC report of an American Avocet did not describe or mention the distinctive bill nor was the bill even shown in the field sketch provided. In most cases size and shape are fairly simple to convey by comparing your rarity to nearby birds and/or common species that are not present for direct comparison. For example: "The Lark Bunting was much larger than a Song Sparrow seen nearby and it had a more robust chunkier look. The bill was very conical, similar in shape to that of an Evening Grosbeak or Indigo Bunting but with a size in between those two species. The tail was notched."

If you know or have some sense of the age or sex of a bird, indicate this right up front. It helps the reviewers focus on the most relevant details. You should go further by explaining what specifically led you to your age/sex determination, especially in difficult cases - this can be done later on in the report if you wish. Direct comparisons made to birds nearby, or better, right next to your rarity, are more compelling than those from memory. For example: "The Hoary Redpoll was the same size as the Common Redpolls it was with. It was also the same shape except for the face and bill. The forehead appeared straighter up and down than on the Commons, making the face appear flat. The bill was very tiny, the same length up and down at the base as from tip to base."

When writing a rare bird report at home, you should have field notes for reference. If you did not take any field notes or make sketches, then you still should not look at the plate or text in the field guide. However, it can be very helpful to refer to the topographical sketches at the front of the guide so that you can use the proper terminology when writing about different parts of your bird. This will simultaneously prompt you to remember certain features and make your report clearer. In a desire to make your report complete, however, you should never include description of features that you did not specifically observe in the field. For example, if your notes describe the back feathers but not the scapulars, then state that you did not specifically notice the scapulars. Or, if you realize that you may have been looking at the scapulars and called them the "back" in your notes, then simply explain this. The members of NYSARC are not sticklers for form or proper terminology. They realize that people have different ways of saying the same thing. However, they are very concerned about accuracy and objectivity.

Many birders identify birds by their "Peterson" field marks. This system of identifying birds by noting one or two simple features or field marks, was instituted by Roger Tory Peterson many years ago, and is still the basis of field identification today. For example, a tanager with wing-bars is a Western. A

sparrow with a red cap and a “stickpin” on its breast is a Tree. A red shorebird with a down-curved bill is a Curlew Sandpiper in breeding plumage. The Peterson field guide is what I used to learn the birds. I still consider it an excellent guide for beginners, as it greatly simplifies the identification process. Unfortunately, these field marks are not always diagnostic. While critical identification features should be emphasized in a rare bird report, exhaustive detail is always preferable to a bare-bones description that mentions only the few key field marks. A thorough description will often indicate additional features which you may not even have realized were important.

The shortcomings of the “Peterson” field mark system were illustrated by an aberrant male Red-winged Blackbird at Jones Beach a few years ago. The bird had large blocks of white on the wings and tail and a creamy throat patch. Local birders called the rare bird alert, reporting an unidentified exotic, “probably of African origin!” When veteran birders arrived, they could tell instantly that it was actually a Red-winged Blackbird. It was identical in shape, habits, and calls to the other Red-winged Blackbirds it was with and differed only in the aberrant plumage. Even some quite experienced birders are still using field marks only and pay little attention to the gestalt of the bird itself.

A complete description can make the report more believable by discussing your identification process. What made you first think that you were looking at something unusual? What tipped you off to your identification? What convinced you? Laying out what your thought processes were in the field can be very helpful to a reviewer, all of whom are active birders themselves and are likely to relate to the particular circumstances you describe.

Considering Similar Species

If your description is very thorough, it will have ruled out all other bird species. Usually, however, it is still necessary to discuss similar species, comparing the bird you saw to the ones it is most likely to be confused with. Failure to discuss the possibility of similar species is one of the most frequent reasons given for turning down a report, especially if the main descriptions are weak. Highlighting the field marks you saw which are not shown by the look-alikes greatly improves your report, and reveals that you are aware of and considered all other likely possibilities. The combination of a thorough description and careful consideration of similar species is particularly important when those species are *very* similar to your rarity. Some reporters prefer to compare similar species right along with the description. This is perfectly acceptable. Just do not overlook any other similar species!

It is also useful to write a few words about your prior experience with the species in question and its look-alikes. Whether or not a species is on your life list actually reveals very little about how familiar you are with the species. How many times you have seen it and at what times of the year are a lot more insightful. For example, having experience with breeding-plumaged adults in the spring may be very different from having experience with juveniles in the fall.

Fear of Rejection

As discussed above, the most frequent reasons for non-acceptance are an incomplete description and failure to consider similar species. Occasionally, reports are turned down for what might be considered surprising or even “off-the-wall” reasons. These might include failure to consider a leucistic form of a more common species, exotic possibilities (cranes, waterfowl, pelicans, bishops, weaver finches to name a few), or hybrids (waterfowl, gulls, falcons are some examples). While these “odd birds” occur only rarely, they still are a legitimate concern. The average birder may have neither the experience nor the knowledge to think of such possibilities, which is all the more reason to provide as thorough a description as possible.

What do you do if, despite all of your best efforts, your report is not accepted by the records committee? First and most importantly, do not be discouraged! Try to learn from the experience. Ask yourself, “Did I see everything necessary to completely rule out my bird being any other species and was this reflected in my report?” Read the reasons for non-acceptance given by the reviewers and try to see how you could have improved your documentation. Any very active birder who documents every rarity he or she sees will likely have one or more of them rejected. But rather than accuse the NYSARC of playing favorites or being incompetent, try to understand why your report was turned down. This analytical approach can improve your field skills as you become better and more prepared for observing and documenting a rare bird in the future.

Digiscoping

Photographs of birds have long been a great asset to the documentation process. However, obtaining detailed photographs has usually required a close approach to the bird or very heavy and expensive telephoto lenses. Although some birders have successfully used SLR-cameras to take pictures through a spotting scope, the newer digital cameras have revolutionized this method. Digital cameras are very compact high-quality optical instruments. They can be simply held up to the eyepiece of a scope to quickly capture a detailed image of a rare bird. The image must then be downloaded into a computer from which it can be printed out, posted on a web site, or e-mailed to the NYSARC Secretary. Moreover, easy to use software, such as Photoshop, allows the user to lighten or darken an image or even sharpen it. This can greatly increase the details that are visible in the photo. However, you must avoid the temptation to alter the image to show details that you did not observe in the field. The process of using digital cameras to take photographs through a scope has become increasingly popular and is widely known as digiscoping. This revolutionary technology (Stanford 2002, Wood 2002) is exciting to records committees and birders alike for the improved ease of documentation it promises.

Lesser quality or small images are better than none at all, especially if they are accompanied by a thorough description. When cropping photos, avoid cropping them too tightly as it is often helpful to leave other species and/or clues

of habitat in the photo. For example, a common gull species shown next to your rare gull might allow a reviewer to compare their relative size, shape, and mantle shades, etc.

The Review Process

The procedures of the NYSARC are described in the committee guidelines (*Kingbird* 48:116-119, *Kingbird* 50:25-27). When you send in a rare bird report, the NYSARC Secretary makes copies and sends one to each of the seven members. How long it takes to review a report depends on several factors that include the thoroughness of the description, whether or not all similar species were considered, the difficulty of the identification, the variability of similar species, and the degree of rarity. The length of time a reviewer spends on your report varies from a few minutes to, in rare cases, several hours or even longer. The reviewers are not allowed to consult one another about any first-round report. They can, however, seek outside opinions. After all reviewers have returned their decisions (i.e. accept, not accept, accept identification but questionable origin, or abstain), the Secretary tallies the votes. If a decision according to the guidelines is not reached, the report is recirculated along with each of the reviewers' comments for a second round. If necessary, the process is repeated for a third and final round of review. In the second and third rounds, in addition to reading each other's comments, the committee may consult one another about a report.

After a decision has been reached, the Secretary or the Chair will send a notice of decision to the submitter of the report. If the report has not been accepted, in accordance with a recent change in the Guidelines, a summary of the reasons for non-acceptance will be included with the notice. If new information comes to light about a sighting, a report can always be revisited. If you feel strongly opposed to the non-acceptance vote, you can write to the committee requesting a new review but you must also explain why you believe the committee's reasons for non-acceptance are invalid.

Special rules apply for species not previously recorded in the state. To be added to the official New York State checklist, a report of a first record must be unanimously accepted by the committee. In addition no species may be added to the official NYS checklist as the result of a single observer report without either an unequivocal photograph, video, sound recording, or specimen.

No matter how many years have passed since you saw that rare bird, a report can always be submitted. However, in such cases field notes or photographs become even more important. It is usually best to complete your documentation as soon as possible after the sighting and send the report to the Secretary right away.

Conclusion

Some will tell you that taking field notes and documenting rarities is tedious and time-consuming, or that it takes the fun out of their hobby. I will tell

you that it gives scientific credibility to your birding and that it can also give you a sense of satisfaction by making an important, lasting contribution toward a better understanding of the status and distribution of the birds within our state. Personally, I look forward to seeing rare birds as much for the opportunity to document them as for adding a bird to one of my many lists.

Documenting your rare bird sightings requires a little time and effort. Some people will find that it takes longer than others, depending on a number of factors, not the least of which are the species involved and the reporter's attempt to be thorough. However, it is really not all that difficult and can even be fun. In addition to contributing to the scientific record, documenting your sightings can make you a better birder with a more critical eye. Give it a try the next time you see a bird on the NYSARC review list. Even if it is a bird seen by hundreds of other birders, if nothing else your report can serve as good practice for the day you become the discoverer of a rarity! More likely, however, you will be making an important contribution. Consider this - only three reports were received for the Broad-billed Sandpiper, at Jamaica Bay Wildlife Reserve, NYC in 1998, yet it was seen by almost 1000 birders! Therefore, you need not worry about flooding the NYSARC with tons of reports. Multiple reports can provide details that collectively prove the identification, they may corroborate certain important features, or they may extend the range of dates that a rarity was known to be present. For these reasons alone, the committee encourages the receipt of multiple reports for every rarity!

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