

DOCUMENTING AND REPORTING RECORDS

Birders run the gamut from obsessive expert to casual neophyte. Anyone who sticks with this pastime for very long is likely to encounter, at least occasionally, a bird out of its usual range, season, or habitat. Such odd occurrences, which can be cobbled together to teach us a great deal about a species' biology once a sufficient number has accumulated, used to be documented only with specimens. Specimens continue to play a pivotal role in ornithology, but few birders have the means or desire to acquire them. Instead, modern birders rely on photography, video technology, audio recordings, sketches, and, most often, the written word.

The importance of documenting an unusual record ought to be self-evident. As in any science, advances in ornithology must be founded on data. A keystone of the scientific process is the ability to check and recheck data. Such a venture is easy with a proper specimen, which can be reexamined and even re-identified decades after it was collected. Photos, videos, and sound recordings provide tangible evidence that can also be reexamined,

but each is a step removed from having the actual bird. Photographs, for example, vary in quality from astoundingly clear to blurry or distant, the latter making identification more subjective or open to interpretation. Moreover, different angles or lighting can play a large part in an image's clarity, colors, or value as a scientific document. A stunning head-on shot of a Dusky Warbler, for example, may not strongly support the species' identification, not because the photograph is bad, but because the angle does not reveal important field marks. Consider also that the best at-sea photos of a "Dark-rumped" Petrel, such as those on pages 91 and H-13, are unlikely to support the bird's identification at the species level (although development of new identification criteria could permit species-level identifications of these birds in the future).

Nevertheless, physical evidence is, in important ways, clearly superior to the written word. Every type of evidence supporting a bird record, whether specimen, photograph, or written description, has an associated level

of uncertainty. Potential for error is smallest with a specimen (although mistakes still occur), intermediate with other sorts of physical evidence, and largest with written documentation. Humans are not machines, and vagaries of skill, experience, and frame of mind ensure that no two descriptions, whether of the events or of the bird, will be identical. The variation between descriptions can leave considerable room for speculation as to what was actually seen. Few birders are dishonest, but such factors as desire to see a rare bird, previous encounters with the species or similar species, and differences in alertness or attentiveness combine to color our experiences when observing a bird or when judging the observations reported by others.

Providing peer review of the available documentation in support of a record is the function of a records committee. By attempting to apply a uniform standard to the adjudication of records, a committee endorses a certain subset of records as “acceptable”—that is, those occurrences are found to be supported by sufficient documentation to be considered among a pool of valid records for a certain region. A committee’s function in filtering wheat from chaff could be compared to that of a referee for a scientific journal. Errors are made in either vetting system, and both tend to be conservative, but each shares the goal of ensuring that only the best and most reliable information becomes published as part of the scientific record. Our collective understanding of avian distribution, migration, dispersal, and ecology depends on the quality of the data. By providing standardized, multi-person review of these data, records committees help to ensure their quality.

Of course, another component to quality control is the birder himself or herself. Written documentation can establish the validity of a record, but only if the observer takes care to be as objective and forthcoming as possible about the sighting. For any sighting—but especially for truly exceptional ones (e.g., a first state or regional record)—myriad factors may conspire to generate enough doubt in the minds of those sitting in judgment that the record will not be received favorably. We must therefore endeavor to provide sound, reliable documentation, as free from biases and preconceived ideas as possible.

The basic part of any piece of written documentation is the description of the bird in question. *The description should be based on the appearance of the individual bird*, not on the generalized appearance of the species. After making an identification, some may be tempted to prepare a description by simply writing down diagnostic field marks of the *species*, perhaps as given in the pages of a field guide. There may be a certain logic to thinking “well, the bird was obviously an immature Reddish Egret, so I’ll describe an immature Reddish Egret,” but such an approach does nothing to improve one’s knowledge of the

species. Moreover, experienced reviewers are surprisingly adept at identifying past descriptions, particularly of individual birds known to show unusual or otherwise distinctive markings. A specimen or a photograph is of a particular individual bird—a written description should be as well. That said, it is perfectly acceptable to compare and contrast one’s detailed, contemporaneous observations of a particular bird with the generic depiction in a field guide. Moreover, on rare occasion, a single description may serve to describe a number of individuals (e.g., a flock of 20 Roseate Spoonbills). In such a case, the description should discuss the range of variation in various features exhibited by individuals in the flock.

Writing a good description requires practice and determination. Jotting notes and rendering rough sketches while watching the bird is the best way to ensure that your description is not influenced by other sources. Through practice you will become more adept at registering details of plumage and shape. An awareness of these subtleties feeds upon itself, making an observer want to know more—not just the species involved, but perhaps also the bird’s age, sex, or subspecies. Even if you do not delve this deeply, a thorough, accurate description may well allow others to determine a bird’s age, sex, or subspecies merely from your written details. Avoid getting caught up in describing only the plumage, a common tendency in many descriptions. Shape, relative size, bare-part coloration, vocalizations, and behavior can offer important clues to a bird’s identity and should be recorded at the time of observation. Dittmann and Lasley (1992) presented a thorough “how-to” guide for documenting rare birds, and Howell and Pyle (1997:118–121) reviewed proper procedures for documenting birds at sea.

When describing a bird, think about other species that are similar. A description of an out-of-range Clark’s Grebe is more convincing if the observer acknowledges that she considered the Western Grebe and eliminated it for reasons *x*, *y*, and *z*. To this end, it can be equally important to mention your past experience with the species in question, or with any similar species. A report of a vagrant Worthen’s Sparrow from someone who has never seen a Field Sparrow will be greeted with greater skepticism, and deservedly so, than will a similar report from someone who has seen both species and spent time studying and pondering their similarities and differences. Bear in mind also that the level of scrutiny a record receives will be in direct proportion to the bird’s rarity. Details for a first record for North America will be subjected to greater scrutiny than will those for a state first, which in turn will be looked at more critically than will those for a county first. (Oddly enough, however, the birder who reports a species never before seen within someone else’s local “patch” often finds that the level of scrutiny again rises to roughly that of a continental first!)

Particularly when birding an unfamiliar area, try to be aware of the local status and distribution of the species you observe and report. Nothing raises eyebrows faster than casually dropping the name of a very unusual species in a way that suggests to the listener that you considered the bird to be of only passing interest.

When confronted with an apparent rarity, it is important to calmly and clearly consider *all* the options, and it is at this point that fortune most clearly favors the prepared mind. Obviously, a putative Lesser Sand-Plover must be distinguished from a stained or otherwise odd-looking Snowy Plover. But why is the bird not a Kittlitz's Plover (*Charadrius pecuarius*) recently escaped from an aviary (see the species account on page 479), and what steps can you take to help rule out a Greater Sand-Plover (see the species account on page 156)? Preparation and clear thinking will also help you gather enough evidence to separate the Little Stint from the Red-necked and the Eastern Yellow Wagtail from the Citrine (*Motacilla citreola*). Those charged with critically evaluating these records expect, with good reason, to be presented with evidence sufficient to rule out every *reasonable* alternative identification. Evidence that fails to meet this high standard is unlikely to be endorsed by a committee.

Be as specific as possible. Was the back spotted, or was it actually the scapulars that were so marked? Expand your palette beyond the most basic colors. Was the bill truly black, above and below, and are you sure that the base was the same color as the tip? Use unambiguous language. And by all means avoid blanket statements such as “it looked like the drawing in Sibley’s field guide” or “all the field marks were observed.” It is always better to precisely describe the field marks you did see and to make clear what you missed.

A last piece of advice is to consider purchasing a digital camera and carrying it with you, at least in the car. Despite some limitations of photography mentioned earlier in this essay, the potential benefits are simply too great to ignore, particularly if you bird alone. The thrill of finding an extremely rare bird can very quickly morph into frustration and disappointment if the bird cannot be refound by others, even if you prepare a competent

written description. This is because single-observer sight records—and those by multiple observers who lack experience with the relevant species—tend to be evaluated very strictly by records committees and other authorities. Even if you describe the bird’s appearance down to the scales on its feet, the record will always be stronger if you manage to obtain identifiable photographs, video, or audio. Consider also that photographs are great levelers. That is, a photo submitted by a rank novice and another from a well-regarded expert will receive the same consideration from a records committee. As alluded to before, the same cannot be said for written descriptions, since most committee members give weight to an observer’s experience and reputation (and, in most cases, a beginner’s description is manifestly inferior to that of an expert). For a prime example of the potential value of a photograph, turn to Figure 263 on page 256. The small and grainy image of a Stonechat is adequate to document a state first a decade after the sighting, despite the bird having been reported as a different species! Light and compact digital cameras with powerful zoom lenses have become surprisingly affordable in recent years, and even the most basic pocket models can be useful for “digiscoping” through a spotting scope. The CBRC wholeheartedly embraces this technology-driven birding trend.

A closing note: please be aware that those who serve on the CBRC—and presumably the members of every other bird records committee—appreciate the many and varied frustrations attendant to the record review process. Virtually everyone who has served on the CBRC has submitted records that were not accepted by the Committee. This includes some notable records involving birds seen by multiple Committee members. If you are serious about contributing to the process, “rejection dejection” is almost certain to befall you at some point, perhaps several times. Beyond the usual platitudes about “learning from the experience,” we ask readers to keep the scientific record somewhere in mind. To a great extent it is the conservatism inherent in the record review process that gives bird sightings, and not just specimens, full standing in the scientific record.

