

RARE BIRD DOCUMENTATION: A Guideline

by
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The common goal and general wish of most Ontario birders who see a rare bird is to have their sighting/discovery included in the Provincial record. In order to do this, the details of their sighting must be accepted by the Ontario Bird Records Committee (OBRC). Documentation of these sightings can be accomplished by any one of three methods—photograph and/or tape recording, a specimen or a written account of a sight record. This report will discuss briefly the first two methods and deal at length with the last, most widely used method.

Specimen: Very few birders will ever need to be concerned with this form of documentation. If you do secure a specimen (e.g. a roadkill) there are some specific steps that should be taken to document the record.

Unless professional facilities for the preparation of a study skin are available, the specimen should be frozen as quickly as possible. It should be double-wrapped in freezer bags with as much air as possible evacuated from the bags. Two complete sets of data should be made, one attached directly to

the specimen and the other as a label outside. The data should include the following: the date the specimen was found; the exact location; the collector; the colour of fleshy parts (e.g. legs); any relevant comments (e.g. window kill). Arrangements should then be made to transport the specimen to either the Royal Ontario Museum (Toronto) or the National Museum of Canada (Ottawa).

Photograph/Recording: With the coming of affordable Single Lens Reflex cameras (SLRs) and compact tape recorders many more sightings are being documented with high quality photographs and tape recorded song. The ROM maintains a photo/tape duplicate file of rare bird records for Ontario. The OBRC welcomes mechanically recorded evidence of rare birds and will, if requested, duplicate and return material supplied. A "Rare Bird Report" outlining all relevant details of the sighting should accompany the material evidence.

When photographing rare birds a few points should be kept in mind. Ideally, the photograph

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should, without any doubt, clearly identify the bird. While distant, slightly blurry shots are often adequate for very distinctive species (e.g. Clark's Nutcracker), extremely crisp, full-frame shots may be needed for others (e.g. Long-billed Dowitcher). A series of photographs may be necessary for some species and may also yield additional information, such as subspecific identity. The presence of other birds in the photograph is often useful as it can help to determine the relative size and external factors such as lighting. A bonus is to identify the location of the sighting by a distinctive geographic feature in the background. Always retain a copy of at least one identifiable photograph in case of loss or damage in the transportation or duplication process.

Sight Records: This type of documentation is of interest to most observers. But what exactly is the purpose of a sight record? It should be *an historic account of an observation which will continue to stand as valid material evidence* in the future. Documentation of a sight record must therefore, be as complete and precise as possible. For example, even if an OBRC member has seen a rarity but does not feel the submitted documentation is complete, then that member should not accept the record. This may seem perplexing but it is the only way to utilize sight records in a valid scientific record.

As a member of the OBRC, I find it extremely difficult to reject any record. In a pastime where we

all share a common goal such decisions are a loss not only to the reporter(s) but to the historical record. At present the OBRC rejects about 25% of submitted records. I am sure I speak for all members of the committee in saying our goal is 100% acceptance of submitted records.

What are the reasons for these rejected records? Usually they are not complex. Often they are simple yet critical omissions or generally incomplete descriptions. For example, a common problem is that while the 'field marks' may be described, the actual shape, size and proportions of the bird are neglected! Finally, it simply has never been stated what is considered adequate documentation for a sight record.

Therefore it seems appropriate to present a basic interpretation of how to document a sight record with some examples. This is not intended as a rigid format but as a guideline which can be adapted.

The logical place to start is with the "Rare Bird Report" or verification form. About 20 different forms with a variety of formats are circulating throughout the province. I would recommend that all submissions to the OBRC be done on the new standard report form available from the Secretary, OBRC (see back cover). Much of the information requested may seem tedious but it is all necessary.

There are four basic parts to any report form: miscellaneous details; circumstances of the observation; complete description; discussion. Each section will be discussed separately with examples.

Miscellaneous Details: This is usually a straightforward series of fill in the blank type questions. The most necessary ones are listed below.

1. Species? Sex? Plumage? Number? (e.g. Red Phalarope, sex unknown, fall adult)
2. Locality? (e.g. Essex Co., Leamington, Leamington Pier at end of Erie St.)
3. Date and time of observation? (e.g. 4 October 1981, 12:41-12:53 p.m.)
4. Optical equipment used? (e.g. 9X36 Bushnell Custom Binoculars)
5. Weather? Lighting conditions? (e.g. no wind or precipitation, overcast)
6. Date and time of writing report? (e.g. 4 October 1981, 6:00-6:30 p.m.)
7. Name? Address? Signature (e.g. John Doe, RR 3, Leamington, Ont. N1T 3V6)

Circumstances of the observation: This section should include the following details: how you came upon the bird; initial impressions of the bird; who you were with; when you identified the bird; conditions for viewing the bird; distance over which the observation was made as well as information which helps to clarify the observational circumstances. For example, "As Jane Doe and myself drove up to the base of Leamington Dock we noticed a greyish-white robin-sized bird sitting in the water about 30m up the south side of the pier. We stopped and viewed it through the open car window and immediately identified the bird as a fall adult

Red Phalarope. We slowly approached the bird to within about 10m in completely unobstructed view for two minutes. Viewing conditions were excellent. When we left after about 10 minutes the bird was still in the same location."

Complete Description: This is by far the most important section of the report. Where possible *original field notes or sketches should be attached* or photocopied. The OBRC realizes that not everyone is artistically inclined (myself included) but by all means use simple, rudimentary diagrams. These sketches are extremely helpful when well labelled and clearly presented and are almost essential for complex feathering patterns. A description can be broken into five parts: plumage; fleshy parts; size and shape; behavior; vocalizations.

1. Plumage—In this section the entire plumage of the bird should be described. Try to be as specific as possible. If, for example, you are describing wing-bars, say whether they were broad or narrow, which coverts they were on, what colour they were, etc. All field guides have a basic outline of the topography of a bird indicating all the feather details. These outlines can be very helpful in indicating specific areas of the individual. If you are using comparatives such as "sand-coloured" remember that the comparative itself is often variable. In this case, sand can vary from black to red to white! Figure 1 gives an example of a simply diagrammed, yet completely

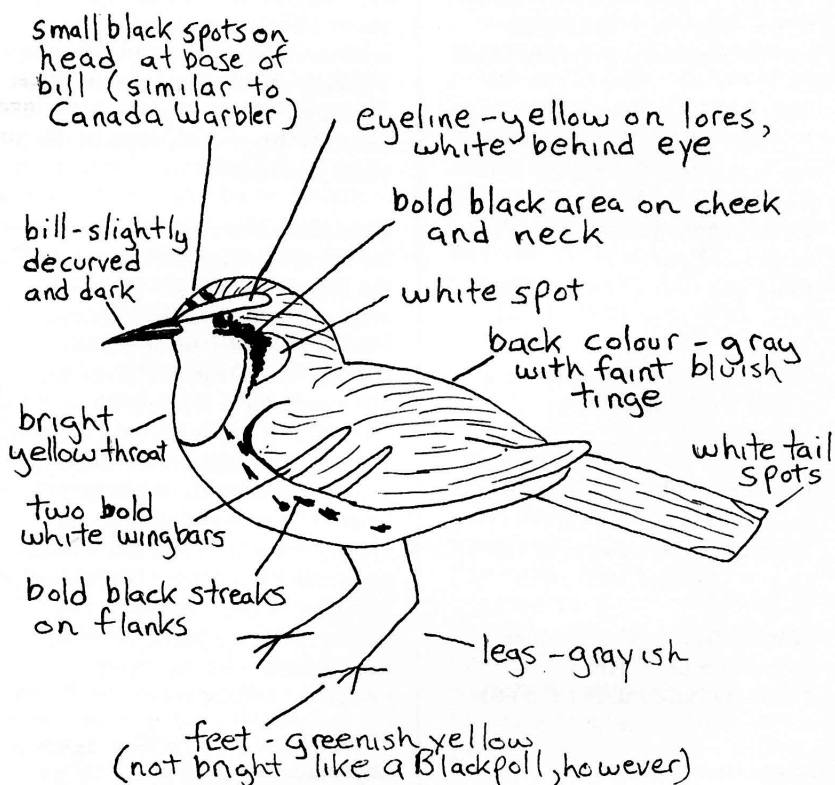


Figure 1. A simply diagrammed, yet completely diagnostic plumage description of a Yellow-throated Warbler. Other notes on the page give further details of sighting.

diagnostic plumage description even to subspecies.

2. **Fleshy Parts**—This includes the legs, bill, eyes, occasionally facial skin (e.g. Black Vulture), and eye-ring, if fleshy as in gulls. Special attention should be placed on colour as this is a crucial factor in some groups. Bill shape, proportions and leg length are

important considerations as well. Figure 1 provides adequate documentation, for the species described, in respect of this section of the description.

3. **Size and Shape**—What type of bird was it? (e.g. a grebe? a heron?) More importantly, how large was it? The best measure of comparison is another nearby

species. Remember that these species must be correctly identified to make the comparison valid. Differentiate between tallness and bulk. Many short-legged shorebirds are as large and bulky as long-legged species but are "shorter". If there is no yardstick for comparison, say so. Describe the shape using the same method.

4. Behaviour—Describe what the bird did. Was it sitting? flying? resting? preening? If it was feeding, was it probing in the mud, flycatching or drilling holes? If it flew, describe the flight pattern. Was it undulating or direct, weak or powerful? If it was swimming, how high was it in the water? Did it dive? How often? How did it take off? Did it pump or flick its tail or wings?

5. Vocalizations—Vocalizations are important, even the smallest chip-note. Try to be as precise as possible, although admittedly describing a call or song is very difficult. Avoid saying "It was the call of the Swainson's Warbler, with which I am totally familiar." This is not considered valid evidence. Was the song long or short, loud or soft, clear and liquid or harsh and chattery? Was it jumbled, continuous or crescendo? Use phonetics if you are familiar with them. However, I have rarely heard two people describe the same song with the same phonetics!

Discussion: In this section you should explain why you believe it to be the stated species. *Explain your reasoning and consideration of all similar species.* This can

include marks you checked for but did not see. Describe your experience, and that of other observers (if any), with the reported species, similar species, in similar plumage, other plumage. Include any reference material you have consulted during or after the observation and how it affected your decision, if at all. If you know of any observers who saw the bird but disagree with your identification or were not completely convinced list their names or persuade them to either submit their own written report or append and identify their comments to your report. The first and last dates of observation should be included, where possible.

To many experienced birders, the foregoing may seem insultingly obvious. Unfortunately some individuals continue to submit incomplete reports. To all observers, experienced to novice, I hope this guideline is of use. To summarize sight records again, the following are crucial. 1) Be as complete and precise as possible. 2) Do not assume anything. 3) Field notes, sketches and diagrams should be used, if possible.

A final selfish plea! Judging your peers records is already cause for much agonizing and soul-searching. Complete, well-written reports would make the job of future OBRC members much easier.

Acknowledgements

Thank you to Dave Brewer whose thoughts were extremely helpful in preparing this report. Also OBRC members, particularly Bob Curry for critical comments.