

## THE IMPORTANCE OF DOCUMENTING BIRDS

by Mark Lynch

Birding is a rather unique enterprise in which so-called amateurs can often contribute important information on behavior, distribution, and occurrence of species to the body of ornithological knowledge. An important part of this is finding and documenting unusual and rare birds in any given area. Throughout the last several years I have had the chance to review records of "rarities" for several organizations, most notably and recently the Massachusetts Avian Records Committee (MARC). It has been very frustrating and distressing to learn that most birders who see an uncommon or rare bird do not send in documentation of the sighting to the appropriate committee or journal. A percentage of the few who do send in documentation do not send in the right information or submit rather scanty and unacceptable details. This is unfortunate because an undocumented sighting becomes a "nonrecord" and ceases to exist as a matter for future contemplation. Sharing information and contributing to our understanding of birds is important, and hence, doing the write-up is just as important as keeping a personal list of birds that you see.

### Birds that Require Documentation

**Any species or recognizable subspecies new to Massachusetts.** Write-ups of these species will be most closely and critically scrutinized and need the most complete details.

**Any species considered rare or very unusual in Massachusetts.** Consult Veit and Petersen (Veit, R.R., and W.R. Petersen, 1993, *Birds of Massachusetts*, Lincoln, MA: Massachusetts Audubon Society) or members of MARC (see article elsewhere in this issue) for species that are considered rarities or very unusual. If there is a rarity at a given location that has been present for some time and many people have seen it, do not assume that someone else has already done the documentation. On many occasions, because everyone assumes that someone else did it, such documentation has not been submitted

**Any species considered rare or unusual for that locality or part of the state.** A Hudsonian Godwit or a Red Knot is common fare on the coast, but a sighting of either in Worcester County would require documentation. Likewise, a sighting of a Pileated Woodpecker in Truro would need a write-up.

**Any species considered rare or unusual for that time of year.** For example, a White-eyed Vireo in winter or a Common Redpoll in June would require documentation. Any even marginally uncommon bird seen during a census (e.g., Christmas Bird Count, Breeding Bird Survey) also should be fully documented for the census compilation. For many birders, documenting a sighting during a CBC is their first experience with doing a write-up.

**Any nesting of rare or uncommon birds in the state.** The state maintains a list of breeding species that are considered "special concern," "threatened," or "endangered" species. The nesting of any species on this list should be documented. Table 1 contains a list of these species.

**Any unusual congregations of birds such as unusually large feeding or migratory flocks, or other unusual behavior.** In these cases, the description of what the birds were doing is as important, if not more so, than the identification of the species.

**Any unusual plumage.** An example of this documentation would be the occurrence of leucistic plumages.

**Any bird that you cannot clearly identify despite a good view.** This is directed primarily to documenting possible hybrids. Several times I have found a bird, studied it at length, and still could not absolutely identify it.

My general rule of thumb is that when in doubt, do the write-up. I will often write up simply uncommon species that are difficult to identify or commonly misidentified. At Broad Meadow Brook Wildlife Sanctuary in Worcester, we are trying to keep a good historical record of all the birds seen at the sanctuary, and all first records of species have to be clearly documented. This means preparing lengthy write-ups for such birds as Bald Eagle and Snow Goose.

### Documentation of a Bird Sighting

Traditionally, documentation meant collecting a specimen, that is, a dead bird in the hand. Thankfully, widespread specimen-taking is largely a thing of the past, now restricted to but a few ornithologists. In a few cases, however, a bird may need to be mist-netted to clinch identification, and sometimes a specimen will have to be taken. [The necessity of taking a specimen for any purpose is controversial. See Davis, W.E., Jr., and J.K. Kricher, 1989, "On Collection: Points of View," *Bird Observer* 17(1):15-20.] Many times a clear and identifiable photograph can take the place of mist-netting or taking the specimen.

Photographing, and now videotaping, unusual birds is becoming more commonplace in Massachusetts, but we are still far behind in photodocumentation when compared with places such as Great Britain. The rare birds issue of *British Birds* (87:11, November 1994) reviews the records of rare birds in Great Britain for the previous year. The color photographs of these birds are simply amazing. There must be many hard-core birders who are also wielding cameras, as well as binoculars and scopes at rarity stakeouts. In fact, there are birders such as Steve Young (author of *Birds on Film: A Photographic Diary*), who seem to specialize in getting beautiful photographs of rarities.

Realistically, no one expects award-winning photographs. Be careful not to approach a bird so closely as to drive it away. Even a mediocre photograph may contain enough visual evidence to be considered a clinching documentation. The

photographs should not be submitted alone, but should be accompanied with complete written details (see below) of the sighting. It is sobering to realize that not all identifications can be resolved even with a good, clear photograph. I have dozens of good slides of skuas taken in Tierra Del Fuego, and I still cannot identify most of them.

### **Required Information for Documentation**

Documentation ideally should include the following.

**Complete plumage details.** Include only those details that you have actually seen, not a laundry list from a field guide consulted after the sighting. It is absurd and very suspicious to write pages about a fleeting sighting of a bird seen in poor light. Truthfully, you should not be writing up poorly seen birds anyway because extraordinary birds need extraordinary views. Although you may strongly suspect that the alcid you just saw whizzing by three miles out in the driving rain of a northeaster is an Ancient Murrelet, it is best always to be conservative and note the sighting as a "small alcid species," if anything. Use the correct and most detailed descriptions of where and what the set of feathers are that you are describing. Avoid using very general terms that convey little (e.g., "the scapulars were rufous" is much better than "some red was on the back"). If you are unfamiliar with terms such as primary and secondary coverts, the fronts of all field guides have convenient diagrams of the topography of a bird. Do not be embarrassed; most birders do not memorize these terms. If possible or pertinent, note also the wear and general condition of the feathers. When relevant, as in gulls and shorebirds, special attention should be given to attempt to age the bird based on plumage (e.g., second winter Glaucous Gull). Try to be as exact as possible in the descriptions of color and patterning on the bird. For instance using the term "red" to describe the color of a bird is too vague because there are many vastly different shades of red (e.g., scarlet, rufous). If you are unfamiliar with the vocabulary of color, try to compare the color to some familiar object. For example, the color of a Purple Finch's head has been described as the color of raspberry juice. As to patternings, it is not enough to say a bird is "streaked" underneath. How far did the streaks continue down the underparts? Were the streaks heavy or fine? Was the streaking dense or diffuse? Was the streaking dark or light? This kind of detail is important in determining the identification of a species.

The point is to be as precise and detailed as possible when describing the "look" of the bird, but only to include what you have actually seen. While doing the write-up, if you find yourself at a loss in describing some important part of the bird's plumage, consider whether, indeed, you got enough of a good look to be absolutely sure that you saw the species in question.

**Complete description of the bill and legs.** Include in the description details about color, length, shape, and other features.

**Table 1**  
**Massachusetts List of Endangered, Threatened, and**  
**Special Concern Bird Species**

<u>Species</u>	<u>Status</u>	<u>Species</u>	<u>Status</u>
Common Loon	SC	Least Tern	SC
Pied-billed Grebe	T	Roseate Tern	E
Leach's Storm-petrel	E	Common Tern	SC
American Bittern	SC	Arctic Tern	SC
Least Bittern	T	Barn Owl	SC
Cooper's Hawk	SC	Short-eared Owl	E
Sharp-shinned Hawk	SC	Long-eared Owl	SC
Northern Harrier	T	Sedge Wren	E
Bald Eagle	E	Loggerhead Shrike	E
Peregrine Falcon	E	Henslow's Sparrow	E
Common Moorhen	SC	Grasshopper Sparrow	SC
King Rail	T	Northern Parula	T
Piping Plover	T	Blackpoll Warbler	SC
Upland Sandpiper	E	Mourning Warbler	SC
Eskimo Curlew	E	Golden-winged Warbler	E

From Massachusetts Division of Fisheries and Wildlife.

SC = special concern; T = threatened; E = endangered

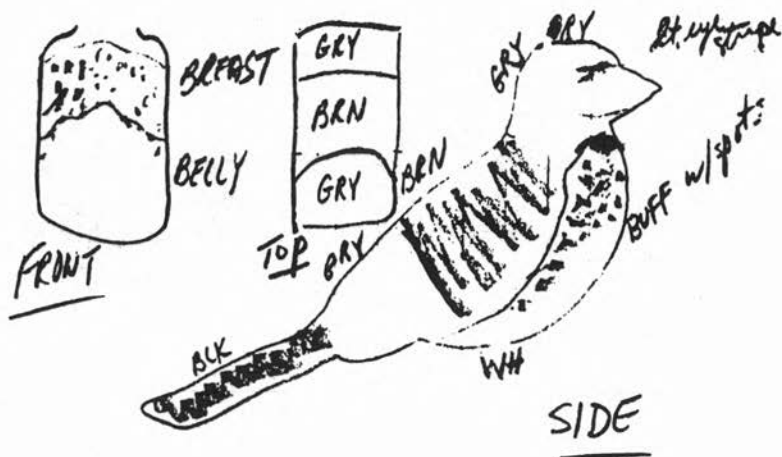
**Description of the proportions of the bird.** Describe the general shape and proportions of the bird. Was it chunky? lanky? long-necked? Did the wings look long for the body? Did the bill appear large for the head? A description of overall size is also important to include. Using comparisons to well-known birds are sometimes helpful (e.g., "larger than a starling," "smaller than a House Sparrow"). Size is impossible to judge on a soaring bird against the sky because we cannot tell how far away the bird is as there are no points of reference against which to compare size. What at first glance may appear to be a "huge soaring hawk" may really be a closely soaring smaller buteo.

**Description of the bird's behavior during the sighting.** Even if the bird did not seem to be doing anything significant (e.g., sleeping), include a complete description of how the bird spent its time during the sighting.

**Details of the circumstances of the sighting.** This should include date, time, a specific description of place (a rough map may be helpful), distance

from the bird (difficult for many people to judge), lighting (cloudy, poor light), length of sighting, weather, and details of optics used to observe the bird.

**A field sketch.** As the saying goes, a picture is worth a thousand words, and this is true in the documentation of birds. Again, take a look at any of the *British Birds* write-ups of rarities, and you will notice absolutely stunning field-sketch artwork. These birders take documentation seriously. As a teacher of art, I know many people are intimidated by drawing, so it is difficult to get people to take the time to draw even the most diagrammatic representation of the bird. Please realize that all that is expected is the roughest of sketches to help fill in details of plumage and proportions and illustrate your written description. I think one of the best examples of this is Ralph Richards' field sketches of the Fieldfare he found in Concord. These simple and sketchy drawings would never be used in a field guide, but they did give a perfect impression of the patterning of the bird. Ideally, you should draw the bird while looking at it, not after the sighting. But many times this is impractical if the sighting is of short duration. The natural inclination is to study the bird closely through binoculars or scope and not pull out paper and pencil and start drawing. Try to do your field sketch as close in time to the sighting as possible, preferably on the spot. This is so the actual look of the bird is still fresh in your mind and not contaminated by details of what the bird should have looked like, according to your field guides.



*Field Sketch of Fieldfare by Ralph Richards*

**Details of your past experience with the bird.** This is optional and is only useful if you are brutally honest with the accounting. Resist the temptation to pump up your reputation and field experience.

**Your name and address.** You may also want to submit a clearly typed or written translation of your field notes along with your original notes.

If a group of birders has seen the rarity, ideally, each birder should do a write-up without consulting each other. This is far from practical. Please be careful, however, in the excitement and ensuing discussion of what you all just saw, that you do not start becoming convinced that you saw details that someone else has mentioned. This dynamic is very common and simple human nature, but try your best to resist the spirit of arriving at a group conclusion of the details seen. Each of the birders should do a write-up of the sighting if the bird is a true rarity (e.g., Terek Sandpiper), but each write-up should include only those details actually seen by each individual, not a group consensus.

### **A Plea for Honesty**

Theoretically, one could have a marginal sighting of a bird and "sweeten" the description with details gleaned later from different sources to create a more convincing write-up, and no one would find you out. You know what I am talking about. The temptation is great. Please strive for an honest recollection of exactly what you saw without any added details. Birding is based on honesty, and anything that undermines that trust is unfortunate. Birding is also based on human perception, which can play countless tricks on us, especially when we are psyched to see a rarity. We all make mistakes and many more times imperfectly see a bird that we want to be something special. Always try to be honest, humble, and write up only what you actually see and not one streak or wing bar more. The ideal write-up is done in the field before the field guides are consulted. This is not always practical, but it is something to shoot for.

### **Where to Send the Documentation**

Documentation for all the cases discussed in "Birds that Require Documentation" above should be sent as quickly as possible to the MARC, c/o Wayne Petersen, Massachusetts Audubon Society, South Great Road, Lincoln, MA 01773. As noted elsewhere in this issue and in earlier issues of *Bird Observer* (e.g., 20(3):158, 1992), MARC serves as the official bird records committee for the Commonwealth.

Records of nesting or even territorial behavior of state or nationally listed species that are considered for special concern, threatened, or endangered (Table 1) also should be sent to Natural Heritage and Endangered Species Program, Massachusetts Division of Fisheries and Wildlife, Route 135, Westboro, MA, 01581.

For purposes of informing the general birding community of unusual

sightings, birders can send their sightings information also to *Bird Observer*, which publishes monthly bird sightings for the ten counties of eastern Massachusetts (Essex, Middlesex, Worcester, Suffolk, Norfolk, Plymouth, Bristol, Barnstable, Duke, Nantucket) and ocean waters off the state's coastline or to *Bird News of Western Massachusetts* (c/o Seth Kellogg, 377 Loomis Street, Southwick, MA 01077), which publishes sightings from the Quabbin Reservoir watershed west. Some overlap in coverage occurs between the two journals, so sightings of unusual birds seen in the Worcester County part of the Quabbin watershed (Hardwick, Petersham, Barre, and Quabbin Reservoir gates 35 to 45) should be sent to both publications.

### Common Concerns of Birders

**Doing a write-up takes a lot of time.** Yes, writing documentation takes time, and it is not always easy. But it is time well spent because it contributes to the overall knowledge of birds in our area. It also improves your birding skills because you learn to observe more carefully and critically. There is also a bit of pride and joy that comes in seeing a record of an unusual bird in a journal with your name attached. Realistically, you are only going to see a few birds every year that are going to need documentation even if you are a hard-core birder. No one individual sees many rarities.

**No one is interested in my record because I am not a well-known birder.** Many, if not most, uncommon birds are found by regular birders. If I can speak on behalf of bird record committees and those who maintain regular censuses (e.g., Christmas Bird Count), your records and documentation are needed. They are important and sometimes critical. Certainly, some records are of more interest than others or are better written than others, but let the journal editors or rarities committees decide which ones are important. Remember, we are all part of a larger birding community.

**I do not want someone passing judgment on my birding skills.** I suspect this is a serious concern for many who are reluctant to submit documentation. The process of reviewing records is an attempt to create an avian historical record of the area, to create a paper trail that can be analyzed now and by ornithologists years from now. Sometimes it is only after analyzing known records of certain rarities over many years that we can begin to uncover a pattern of their occurrence.

**I will feel terrible if my record is rejected by the bird records committee.** Although this may seem to be a natural reaction, it should not be because it is a common experience to have a submitted record rejected. Records are often rejected because there is insufficient documentation to warrant including that record in the written avian historical record of that committee or whatever the record was submitted to. Judging a record is not a black-and-white process, but people who have to decide on accepting records always err on the

side of conservatism. Those who help decide whether to accept a record all have their own standards but all are careful and diligent in publishing records that they believe to be accurate.

**What will they do with all those write-ups?** The most important accepted write-ups are kept on file, but the many write-ups of uncommon birds may also be published as bird sightings in other publications, such as the *Audubon Field Notes* or *Bird Observer*.

### Conclusions

This article is not the last word on documenting bird sightings but rather an attempt to provide some guidelines on how to do write-ups and a notice that write-ups are needed. I have tried to indicate the ideal write-up for all of us to shoot for. Personally, I find documenting a sighting as much of a tense struggle in the field with pad and pencil as the next birder, but I have found that practice does make the process easier. In my birding classes we do write-ups of unnamed photographs of birds passed out in class and critique them later to see if students can correctly guess the species based only on the write-up. This is one way to overcome the fear of writing documentation and honing observation skills. The easiest way to learn about documentation is to just do it. Eventually, if there is a general acceptance by the birding community at large that doing the write-up is as expected as keeping the list, we will all benefit from a desire to be better observers and from a more complete understanding of the occurrence of birds in our state.

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