

PREPARATION AND EVALUATION OF RARE BIRD REPORTS

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This article is a revised and updated version of a paper originally published in *South Dakota Bird Notes* in 1994 (Swanson 1994) and reprinted again in 2004 (SDBN 56:88-95). Rare bird reporting has changed dramatically since the initial publication of this article, and even since the 2004 reprint. The recent proliferation of information and resources for bird identification (see Kaufman 2011), including online resources, the availability of online listing and reporting applications, such as eBird (Wood et al. 2011, Sullivan et al. 2014), and the easy availability of inexpensive, yet high-quality digital cameras with zoom lenses (e.g., Barber 2012) and/or digiscoping with a digital camera and spotting scope (<http://birds.cornell.edu/AllAboutBirds/gear/Digiscoping/>) have revolutionized birding and bird reporting. These resources are helpful in providing information to assist with the preparation of rare bird reports, but they don't substitute for careful attention to detail in the field. In the remainder of this article, I will review the charge and procedures of the Rare Bird Records Committee of the South Dakota Ornithologists' Union (hereafter RBRC) and the type of information that the committee desires in rare bird reports to facilitate their review.

INTRODUCTION

The RBRC is charged with monitoring the status and distribution of rare and vagrant birds within the state. The RBRC maintains a review list of rare and vagrant birds for which reports are solicited. These review species are marked as Casual, Accidental or Hypothetical on the official Checklist of South Dakota Birds (available under the *State Checklist* tab at <http://sdou.org>). Of course, any bird observed in South Dakota that is not listed on the official Checklist of South Dakota Birds also requires a rare bird report, as do birds that are substantially out of range (e.g., Yellow-throated Vireo in Rapid City and Eastern Wood-Pewee in Custer State Park in the 2014 Report of the RBRC in this issue of *Bird Notes*; Swanson 2015). The main mechanism by which the responsibility of the RBRC is carried out is by reviewing reports on rare bird observations submitted to the committee by birders (Springer 1988). The RBRC evaluates all submitted reports to determine whether the description and details in the report provide an unquestionable identification of the species being reported or whether the information provided in the report is inconclusive. After review, the RBRC assigns the report a rating based upon the information contained in the report. The rating system includes the following categories: 1S, 1P, 1R, 2, 3, and 4 (Springer 1988). The class 1 rankings apply to reports that are accompanied by supporting evidence (S for specimen, P for photograph, R for sound recording) that verifies the species claimed in the report. The class 2 ranking indicates that a satisfactory and convincing written description of the bird was provided in the report. Classes 1 and 2 comprise reports that are accepted into the official bird records for the state. Class 3 rankings indicate that the details and description presented in the report are not sufficient for positive identification and the record is not accepted on this basis. A rating of class 3 does not necessarily imply that an identification was incorrect, it simply means that the committee did not believe that the submitted materials provided an unquestionable identification. A rating of class 4 is reserved for reports that the committee believes contain probable or certain misidentifications, and these records are not accepted on this basis. The committee has also used a rating of class 4 for birds for which the report unquestionably provides a correct identification, but for

which the origin of the bird (wild or escaped captive) is likely not from wild populations. Reports accepted into the official bird records for South Dakota are summarized periodically, along with the status and distribution of all birds within the state, in books published by the South Dakota Ornithologists' Union, the latest of which is Tallman et al. (2002).

Since the RBRC is charged with maintaining the official records on the status and distribution of rare birds within the state, the standards for evaluation employed by the committee must be rigorous to ensure scientific accuracy (see Baker 1986a, 1986b). This is particularly true for "sight" records that are not accompanied by supporting evidence. For these reports, the committee requires *very complete* details to classify the report as class 2 and accept it into the official bird records for the state. Oftentimes, reports are submitted that lack sufficient details for the committee to rule out all other similar species. The committee must rate these reports as class 3 or 4, even though the observer submitting the report may very well have been correct in their identification. The purpose of this paper is to inform birders submitting rare bird reports to the South Dakota RBRC about the type of information and degree of detail necessary for the committee to make valid scientific judgments on submitted reports.

PREPARATION OF A RARE BIRD REPORT

One of the major problems faced by the RBRC is evaluation of reports with scanty or incomplete details and descriptions. These reports often consist of a brief listing of one or two prominent field marks and nothing else. These reports usually fail to properly treat how the reported bird differs from other similar species. For this type of report, the RBRC is left with no recourse but to reject the report, even if the observation is valid. Acceptable reports include careful and complete details and descriptions of the bird observed. Preferably, this description should be made *at the time of observation* while in the field and *before* consulting a field guide, rather than later from memory. If not in the field, notes should be prepared as soon after return from the field as possible, again preferably without first referring to a field guide, before memory has a chance to fade (or enhance) details.

Birders observing a species on the review list are asked to file a report with the RBRC in a timely manner. In this way the RBRC can initiate the process of reviewing reports without incurring the delay of waiting and then requesting the observer to submit a complete report. This is especially critical in terms of unconfirmed reports of rare birds that are cited elsewhere, such as in the Seasonal Reports section of *South Dakota Bird Notes* or in the Regional Reports sections of *North American Birds*. Without review by the RBRC, readers of these reports will not know if they have been reviewed and rated as to their acceptability.

On the South Dakota "Rare Bird Report Form" (available under the *Seasonal Reporting & Rare Bird Form* tab at <http://sdou.org>), under the "description of bird" section are listed the following characters: size, shape, colors, bill, feet, eyes, plumage, etc. A complete report will deal with most or all of these features and will describe the *whole bird*, rather than just one or two field marks. I will briefly deal with each of these characters to provide some idea of the desires of the RBRC regarding details on rare birds.

SIZE

The size of a bird is often notoriously difficult to judge in the field, but a general indication of the size of the bird ("warbler-sized," "robin-sized," etc.) is appropriate. If possible it is even better to report *relative size*, if another bird or other object of known size is

nearby. For example, suppose you observe a juvenile Sharp-tailed Sandpiper (which would be a first state record for South Dakota) foraging on the shore of a pond near a couple of Killdeer and some Least Sandpipers with some Blue-winged Teal swimming just beyond the shore. For context, North Dakota now has three fall records of Sharp-tailed Sandpipers (Martin 2000). A Sharp-tailed Sandpiper is about the size of a Pectoral Sandpiper, but this judgement may be tough to make with no Pectorals around. However, you can say that the bird was slightly smaller than nearby Killdeer, substantially larger than nearby Least Sandpipers, and about half the size of Blue-winged Teal swimming just behind it. This description of relative size, using species observed in the same area as the reported bird, functionally establishes the size of the reported bird within a narrow range appropriate for the species claimed.

SHAPE

A good place to start in describing shape is to include a general statement regarding the overall appearance of the bird (“warbler-shaped,” “duck-shaped,” etc.). From there, features such as plumpness of the body, lengths (or relative lengths) of bill, neck, legs, wings, and tail, posture (e.g., perched upright like a flycatcher or horizontally like a thrush or vireo), or additional physical characteristics (crest, webbing on feet, primary extension [the distance that the primary flight feathers extend beyond the secondaries and tertials on the folded wing], etc.) should be treated. Of course, all of these features need not be included for every bird reported, but they are often of great help in arriving at a positive identification. For example, *Empidonax* flycatchers are a difficult identification challenge, but the relative length of the tail and bill to the remainder of the body gives some species (Least, Yellow-bellied, Hammond’s) a “large-headed look” that is a useful field mark (Kaufman 2011). Furthermore, primary extension is an important field mark in *Empid* identification (Kaufman 2011).

COLORS

This feature is fairly self-explanatory, but care should be taken to denote subtleties in coloration and shading, especially between various parts of the body or between possibly confusing species. For example, female Common and Red-breasted Mergansers both have reddish-brown heads and necks, whitish breasts and grayish flanks. However, in Common Mergansers the reddish of the neck is sharply demarcated from the whitish breast, whereas in the Red-breasted the reddish of the neck rather gradually fades into the whitish breast. Another helpful aspect of describing color is to provide precise descriptions of the *shade* of color. As an example, both Long-billed Dowitchers and Red Knots are reddish on the face and underparts in breeding plumage. However, the duller “brownish-red” of the dowitcher is quite different from the brighter red of the knot.

BILL AND FEET

General characteristics such as length, color, webbing or partial-webbing on the feet, droop or upturn to the bill, and feathering around the base of legs or bill can be important identification factors. A useful method of reporting bill length is to report it in terms of multiples of head width. For example, both Whimbrels and Long-billed Curlews have long, downcurved bills, but in the Whimbrel the bill is about 2 1/2 times the width of the head, while in Long-billed Curlews the bill is about 4-5 head widths.

EYES

If possible, eye color should be noted as this is important in some cases (e.g., White-eyed Vireo, juvenile vs. adult Red-eyed Vireos,

female Rusty vs. female Brewer’s Blackbirds). Another factor important in the identification of some species (e.g., Black-billed Cuckoo, certain gulls) is the color of the skin immediately surrounding the eye.

PLUMAGE

A careful description of the plumage is, arguably, the single most important feature in most rare bird reports, and yet it is often one of the most incomplete portions of the report. Great care should be taken in describing the various parts of the plumage in reported birds. These descriptions should be as complete as possible, which means the *entire body* should be described. A “bright yellow warbler-shaped bird” could be a Yellow, Prothonotary, Blue-winged, Wilson’s, or possibly some other warbler, or even an American Goldfinch. Careful descriptions of the plumage color, shading and appearance on the entire body when viewed in good light are of great benefit to the Committee in reaching appropriate decisions on acceptance or rejection. A good place to start is by reviewing the bird topography section in the front of your favorite field guide. Here you will find terms for various portions of bird anatomy that are very useful in providing complete plumage descriptions. In addition, when describing plumage, be sure to note color changes and even subtle differences in shade between various parts of the body (head and nape, wings and back, throat and breast, belly and undertail coverts, etc.).

Furthermore, the *pattern* of coloration is often of great importance to proper identification and features such as facial pattern (superciliary stripe, eye lines, eye ring, crown stripes, etc.), wing pattern (plain, wing bars, wing tip pattern, scapular pattern, etc.), tail pattern (tail spots, bars across tail, outer retrix pattern, etc.), breast, flank or back streaking or lack of it, should always be searched for and noted if present. A complete and detailed plumage description taking into account as many of these factors as possible is integral to a good (and acceptable) rare bird report.

A final factor worth noting relating to plumage is the state of molt, which can provide important context not only for the appearance of the plumage, but can also help determine the age of the bird, which can have important implications for vagrancy (Howell et al. 2014). An in-depth treatment of molt patterns in birds is beyond the scope of this article, but helpful references are available (e.g., Howell 2010).

OTHER CHARACTERISTICS

So far, I have dealt primarily with physical (or morphological) characteristics in describing rare birds. However, there are a number of other factors, such as behavior, voice, habitat or microhabitat and overall impression (or “*giss*”) that can be as important (or even more important) than a careful description of morphological characters. Indeed, a number of the more recent field guides to birds or bird groups (e.g., O’Brien et al. 2006, Karlson and Rosselet 2015) concentrate on overall impression as an identification aid (see Kaufman 2011 for a discussion).

While on its own, behavior is not sufficient for identification of rare birds, it can be very helpful in supplementing and supporting descriptions of rare birds. For instance, Cerulean Warblers tend to stay near the tops of trees, while *Oporornis* warblers are typically observed on or near the ground. Behaviors such as wing and tail flicking can be important supplementary information in the identification of *Empidonax* flycatchers. Also, a tendency for flocking

or solitude can be useful in identification of some birds. Consequently, the behavior that a rare bird exhibits should be carefully noted and included in any rare bird report submitted to the RBRC.

Another very important aspect of rare bird identification is the careful documentation of voice or other sounds, if the reported bird happens to be singing, calling, or making a noise by its actions (e.g., the drumming of a woodpecker). In fact, for identification of some similar species, such as Alder and Willow Flycatchers and Eastern and Western Meadowlarks, voice is the only reliable method for separation. In describing the voice of a bird, particular attention should be paid to the number of syllables uttered and on which syllable the accent (if it occurs) is placed. It is also useful to describe the call or song phonetically and to document the character of the notes given (clear, musical, buzzy, raspy, nasal, insect-like, etc.). In most birds, especially passerines, voice is as species-specific as plumage, and this makes voice a very important component of rare bird reports. In all cases, the voice or other sound that a bird makes should be described in one's own terms, rather than stating that it is like the description given in a field guide.

The habitat or microhabitat in which a rare bird is found can also contribute to its identification (e.g., Pine Warblers are often associated with pines). Thus, careful documentation of the habitat where the reported bird was located (open deciduous forest, mixed forest, shortgrass prairie, cattail marsh, etc.) should be included in the report. If possible, mention the particular species of vegetation present, especially those species that the reported bird was using. Microhabitat differences can also be useful as supporting details (e.g., did the bird stay in the understory, was it restricted to the tops of trees, or did it forage at a number of different levels in the canopy?).

A final piece of supporting information that can be useful in identification of rare birds is the “*giss*” (sometimes referred to as “jizz”) that a bird exhibits (Karlson and Rosselet 2015). *GISS* (“general impression of size and shape”) is a somewhat nebulous character that can be expanded to include the actions, behavior and general appearance of a bird and gives the observer an impression of the overall character of the bird (e.g., active, buoyant, energetic, powerful, shy, swift). Oftentimes, a rare bird acts or appears somehow different in overall character from regularly observed birds, and this impression (or *giss*) alerts the observer to look more closely. Since *giss* is an abstract character, it becomes most useful for identification purposes only after considerable time is spent in the field. A good way to develop the ability to utilize *giss* as an aid to recognizing rare birds is to pay attention to the actions, behavior and general appearance of the more common birds. Then when a bird appears that doesn't quite match the *giss* of the common birds, this should alert the observer to make a more careful observation.

SUPPLEMENTARY MATERIALS

While the verbal description and details of the rare bird form the foundation of the rare bird report, the clinching factors in acceptance or rejection of a report often are supplementary materials provided along with the report. These supplementary materials include physical evidence (specimens, photographs or vocal recordings), sketches prepared *while in the field* and verification by other observers. I will briefly treat each of these types of supplementary materials.

PHYSICAL EVIDENCE

Of the types of supplementary materials mentioned above, physical evidence is the most useful to the RBRC. For some state re-

ports committees (e.g., Texas, Lockwood and Freeman 2014), new state records are not accepted without some form of physical supporting evidence. For South Dakota, documentation of first state records ordinarily requires some form of physical evidence along with the report, but the RBRC currently also may accept first state records when reports lack supporting physical evidence, but are well-described sight records corroborated by two or more experienced birders. A specimen is the best possible evidence supporting a rare bird report, but since the shotgun is no longer a generally acceptable ornithological tool, specimen records are now quite rare. However, if a rare bird is found recently dead, the observer should notify appropriate authorities (South Dakota Department of Game, Fish, and Parks) or the RBRC so that a specimen may be prepared from the dead bird. Such a scenario, for example, resulted in the first South Dakota record for Ancient Murrelet (Williams 1994).

Photographic documentation can be almost as good as a specimen if the photos are of decent quality, and even poorer quality or long-range photos can assist identification. With the advent of inexpensive digital cameras with good zoom lenses, diagnostic, or at least supportive photographs are much easier to come by than in the past (e.g., Barber 2012). Thus, anyone observing a rare bird, especially an extremely rare bird, should try to get photos of the bird to accompany the rare bird report. If you don't have a camera with you at the time of observation, take careful field notes, then try to come back later for a photograph. If you don't have a camera (and preferably a telephoto or zoom lens), try to get someone who does to accompany you to relocate the rarity. A good photograph can make the job of the RBRC much easier.

For species difficult to distinguish by sight, an audio recording of its vocalizations can be very helpful in verifying the reported bird if it is singing or calling. This is particularly true for nocturnal or secretive rarities such as Yellow Rails, Chuck-Will's-widow or various owls or difficult-to-distinguish species such as Eastern/Western Wood-Pewee, Willow/Alder or Dusky/Hammond's flycatchers, and Eastern/Western Meadowlark. In such cases, an audio recording of the bird's vocalization is of utmost value as a supplement to the rare bird report.

SKETCHES

If you observe a rare bird but lack a camera and are in a situation where you cannot gain access to one before the bird is likely to leave, another helpful addition to a careful description is a sketch of the bird produced while in the field. This does not require that the observer have any artistic ability, as crude sketches can still illustrate important field marks (I speak from experience here as anyone viewing any of my sketches will immediately recognize my lack of artistic ability!). Sketches do not even need to include the entire bird to be beneficial in assisting identification, as sketches of important features (i.e., tail pattern, wing tip pattern, facial pattern, etc.) can be very useful as well. One way to get around a complete lack of artistic ability and to allow rapid sketching of a bird is to carry a small field notebook with outlines of bird bodies traced from a field guide (Dittmann and Lasley 1992). When a rare bird is observed, it is then a simple matter of filling in the blank spaces with the plumage pattern of the observed bird. You need not carry outlines for every possible bird family into the field with you, only those you are likely to encounter in the habitat you are birding. For instance, if you are going to visit Oahe Dam in mid-October to mid-November, you might carry outlines of gulls, but not of vireos. Likewise, if you are going to Sica Hollow State Park in mid-May, you would want to carry warbler outlines in your field notebook. Simple sketches like these can greatly improve or add to

a description and are of great benefit to the RBRC.

VERIFICATION BY OTHER BIRDERS

Another important aspect of documenting rare birds, especially for "sight records," is verification by other observers, especially by experienced birders. This verification may involve independent reporting of the rare bird or additional signatures from birders observing the bird but not reporting separately. Single observer sight records of rare birds always require especially careful scrutiny. Therefore, if you are alone and have seen an especially rare bird, after carefully describing it and photographing or sketching it, proceed to the nearest phone and call a nearby experienced birder. This is not only a good practice for verification of the rare bird, but it is a favor to other birders who would also appreciate seeing the rare bird. Thus, not only will you be strengthening your rare bird report, you will be providing a valued service to the birding community.

I should mention here that inexperienced birders or birders unfamiliar to the RBRC should make an effort to get to know other birders in their area. This does not imply that sight records submitted to the RBRC from unfamiliar birders will be rejected out-of-hand, as familiarity to the RBRC is not a prerequisite for observing rare birds and the RBRC must act objectively on all submitted material. However, reports from birders with established reputations for careful documentation often proceed through RBRC action with greater rapidity than reports from unknown observers. This may be interpreted by some as favoritism or exclusivity, but in reality the RBRC is simply making an effort to ensure accuracy of accepted reports. For an interesting discussion of this rather delicate matter, see Contreras (1994). A good way for inexperienced or new birders within the state to become familiar to the RBRC is to attend the Spring and Fall meetings of the South Dakota Ornithologists' Union, as most experienced birders within the state attend these meetings regularly. However, if you are a new or unfamiliar observer within the state, do not let this dissuade you from submitting rare bird reports; just carefully describe the rare bird and try the best you can to provide supplementary materials. In addition, if your records are not accepted by the RBRC, do not take this personally or let it prevent you from submitting future reports, as even members of the RBRC have had reports rejected for lack of sufficient details.

Hopefully, this review of the type of information desired in rare bird reports by the RBRC will allow persons observing birds in South Dakota to more carefully document records of rare species. This, in turn, will ensure the greatest scientific accuracy in monitoring the status and distribution of such birds within the state. One final note, in order to make information on the occurrence of rare species in South Dakota more widely known, persons whose records are accepted (Classes 1 and 2) are encouraged to publish them as notes in *South Dakota Bird Notes*.

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within the state of South Dakota.

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