

Documenting Rare Birds in Pennsylvania

What the Records Committee Looks For

Part 1

by Ed Kwater

The great nineteenth century ornithologist Henry Seebohm used to say "what's hit is history but what's missed is mystery." In his day the only way to confirm the identity of a rare or unfamiliar bird species was to examine it in the hand, having "secured" it first, of course. Nowadays such extreme measures are seldom necessary to identify most species of birds. Modern optical equipment is of such high quality that even distant birds can be identified with a much greater degree of certainty than was possible in Seebohm's day. The proliferation of excellent field guides has led to a far greater awareness of the distinguishing field marks of all bird species in North America. Modern standards of affluence and transportation make it possible for many birders to travel much more widely than even thirty or forty years ago. Birders have access to a greater variety of bird species and they can test their identification skills just about anywhere in North America or further afield. With the greatly increased popularity of birding as a pastime and the greater expertise of the people participating in it comes the potential for discovering birds in areas where they have never been recorded before. State lists are increasing in leaps and bounds as new discoveries are being made and Pennsylvania is no exception.

Sometimes what were thought of as being virtually impossible occurrences turn out to be less bizarre after all as observer awareness and competence increase. For example, when a Slaty-backed Gull *Larus schistisagus* was discovered wintering in Illinois and Missouri in 1986 (Goetz et al. 1986) this was thought by many to be a unique occurrence which would probably not be repeated as the bird was rarely found outside Alaska in the Nearctic Region. However since then Slaty-backed Gulls have been found much closer to Pennsylvania, at Niagara Falls, Ontario, in November 1992 (Ridout 1993) and at Eastlake and Lorrain, Ohio, in December 1992

(Brock 1993). A much better knowledge of the identification characters of Slaty-backed Gull due to such publications as Grant (1986) and the activities of a small but growing band of gull enthusiasts led to these discoveries. This species is now surely a potential candidate for future addition to the Pennsylvania list.

A second example of a totally unexpected occurrence involves a member of the *Empidonax* flycatcher complex in Pennsylvania. Although most species of this difficult genus can be identified by voice characters alone, the plumage of silent birds is often not distinctive enough for certain identification to species. When the Western Flycatcher *E. difficilis* complex was split by the American Ornithologists Union into the Pacific Slope Flycatcher *E. difficilis* and the Cordilleran Flycatcher *E. occidentalis* (A.O.U. 1989), this was recognized as a particularly difficult species pair, which could only be separated reliably in the field by voice. When a "Western type" flycatcher was found in Lancaster County, Pa., in December 1990 (Haas 1991), tape recording of its call established that the bird was a Pacific Slope Flycatcher, the first record of this West Coast species east of the Mississippi. Subsequently another Pacific Slope Flycatcher (or perhaps the same bird) was found the following winter only seven miles away from the original sighting, and once again the identification was confirmed on the basis of a recording of the bird's call (Witmer 1992).

The Slaty-backed Gull and Pacific Slope Flycatcher are just two of the numerous examples which highlight the increasing need for detailed documentation of the occurrence of rarities. There are many others that are not as difficult but nevertheless occur out of range infrequently enough to warrant some form of documentation. But why document sightings of birds in the first place? Shouldn't a simple mention of the occurrence be good enough? Nowadays, due to the volume of ornithological

records generated by the birding community, many states or regions have their own publications which report bird occurrences in the area(s) they cover on a monthly or seasonal basis. These publications are dedicated to the advancement of regional ornithological knowledge so it is important that the information they contain is as accurate as possible. Many state also have records committees which are responsible for judging the veracity of bird records so that state lists can be written with some validity. If the written word of today is to be accepted as accurate in the future, then it is very important that detailed records of the documentation of rare birds are kept today. On a broader scale the A.O.U. and American Birding Association (A.B.A.) Checklist Committees are responsible for judging the validity of bird records to be included on the official lists of their recording areas (North America, and the Continental United States and Canada respectively). (These organizations often require even more detailed documentation than is needed on a state level because they are dealing with potential "firsts" for North America.) The need for documentation is therefore all too evident.

Pennsylvania is no exception when it comes to rare birds. The Pennsylvania Ornithological Records Committee (P.O.R.C.), which was founded in 1989, is responsible for the Official State List (Kwater 1990) and for making decisions on the acceptability of records of rarities in the state. The results of the committee's work are published in *Pennsylvania Birds*, which has become one of the most respected state journals in the United States. The P.O.R.C. has reviewed hundreds of records since 1989. The average acceptance rate from year-to-year has been 70%. Many of these records have received superb documentation. Pennsylvania's first-ever LeConte's Sparrow *Ammodramus leconteii* (Leberman 1992) is a good example of

this. However some records have to go to a second round of voting before being accepted or rejected. Sometimes this is because the species concerned are particularly difficult to identify requiring very detailed documentation. All too often records go to a second round of voting because the documentation received is barely sufficient for the committee to make a decision one way or the other. So what does the committee require as adequate document of a rarity to simplify the decision making process? Specimens, photographs, video and audio tapes, and written descriptions all qualify as documentation and each has its own merits. Many of these tools are the subject of an excellent paper on how to document rare birds, by Dittmann and Lasley (1992) and this is thoroughly recommended reading for all birders wishing to sharpen their documentation skills.

Reference to the P.O.R.C. bylaws (Haas 1988) will indicate that by far the most concrete way to document a rarity is by way of a specimen (Class I-S). Whilst we do not wish to encourage the Seebom approach, many of the rare species on the Official Pennsylvania List (those in bold-faced type, Kwater 1990) are there because the P.O.R.C. was able to discover the presence and whereabouts of historical specimens. Boreal Owl *Aegolius funereus* and Eskimo Curlew *Numenius borealis* are good examples of this as a single mounted specimen of each species, taken in Pennsylvania, resides in the Carnegie Museum in Pittsburgh. However most modern day specimens are of birds already found dead or moribund. Spotted Rail *Pardirallus maculatus* (Parkes 1978) and Black-capped Petrel *Pterodroma hasitata* (States 1990; Parkes 1990) are fine examples. It should be added here that, unfortunately, picking up dead birds is illegal without an official collecting permit or salvage permit.

The best of the more widely used methods of documenting rarities is the use of photographs. A picture can often paint a thousand words and can mean the difference between acceptance or rejection of a record. When a Reddish Egret *Egretta rufescens* turned up at Presque Isle, Erie Co. in May 1953, as many as fifty people, some of them probably armed with cameras, saw the bird. However this species still has not

made it to the Pennsylvania List because no one made any field notes at the time and even more sadly no extant photographs can be located. Photographs of rarities do not have to be the glorious portraits which grace the cover of *Birding* magazine. Even a Polaroid snap shot would do if it clearly depicted the bird in question (i.e., the Great Gray Owl in Warren Co.), but quite obviously the better the quality of the photograph the easier the committee's job. Transparencies are preferable to prints due to their durability and the fact that prints can easily be made from them as and when necessary. All photographs should be clearly labeled with the observers name, the locality, county, and the date the photograph was taken. All these details are actually more important than the name of the species photographed as it is obviously the committee's job to determine this during the evaluation. It is particularly helpful when at least one photograph is surrendered by the observer for the committee's files.

Occasionally even good quality photographs may be insufficient to confirm the identity of a species. The Pacific Slope Flycatcher is a case in point. As this species is only safely separable in the field from Cordilleran Flycatcher by voice, the most valuable form of documentation was the tape recording made of its call. Other species such as Western Meadowlark *Sturnella neglecta* can be adequately documented using this method. A distant photograph would probably be insufficient to separate this species safely from Eastern Meadowlark *Sturnella magna*. Several Pennsylvania records of Chuck-will's-widow *Caprimulgus carolinensis* have been adequately documented by tape recordings and accepted by the committee on the strength of these alone. Videotapes can also be extremely useful in documenting the occurrence of rarities. Pennsylvania's first and only Ross's Gull *Rhodostethia rosea* was filmed using a home movie camera, and the video submitted to P.O.R.C. The observers commentary on such tapes and videos (date, location, county, and any other relevant details) is particularly helpful.

Bearing all this in mind, many rarities are found by observers who are either not photographers or who don't

have access to a camera, tape recorded, or camcorder at the time. Some birds are simply too distant for photography, or never call, making the use of tape recordings inappropriate. In such cases the written word is extremely valuable as a form of documentation. Unfortunately many birders seem to underestimate the value of written descriptions of rarities. In many instances the committee has only received a photograph of a bird as supporting evidence for its occurrence. On more than one occasion the quality of the photograph has unfortunately been insufficient to identify the bird conclusively. The most thoroughly documented and acceptable of records are those where the observer has taken full advantage of as many forms of document as possible. Invariably in these cases the essence and foundation of the document has been a high quality written description. Photographs, tape recordings, and videos should be used to support the evidence provided in the written description, not the other way around. Even good quality photographs will rarely show every single relevant plumage character on a bird. Indeed photographs may sometimes create the illusion of a color or plumage character which the bird did not actually show in the field.

The written documentation received by P.O.R.C. in the last five years has varied greatly in quality. While many observers make an excellent attempt at describing what they see in writing, others supply brief, sketchy or inaccurate notes. On several occasions a person has supplied information on a bird based on a conversation with the observer. In these cases the author of the submission was not present when the bird was seen. Regrettably the committee cannot accept submissions such as these. Only first-hand accounts can be accepted as documentation. For classification purposes, two independent descriptions are needed for an accepted record to be placed in Class II (Haas 1988). Often two observers will collaborate and co-author one description, but this ends up in Class III, if accepted, simply because only one submission was received.

As with all other forms of documentation, written descriptions

should begin with the species described, the exact locality and county, the date (this is missed out surprisingly often), and the observer's name. The circumstances surrounding the sighting should be given, especially the weather conditions at the time. Lighting conditions, degree of overcast, precipitation, wind direction and speed, and any preceding weather conditions which could have resulted in vagrancy should all be mentioned. However, what matters most of all in written documentation is a plumage description of the bird itself. All too often precious little is said about this. In several extreme cases submissions have been received by the committee in which nothing is actually said about the bird's plumage in several pages of narrative. The committee has no option but to reject a record in these circumstances.

Plumage descriptions should be as detailed and accurate as possible, and a thorough knowledge of the plumage topography of birds is important. The most confusing written descriptions received by the committee are those in which it is unclear just exactly what part of a bird the observer is referring to. For instance, one common mistake is the use of the term "eye stripe." Aa Chipping Sparrow *Spizella passerina* for example, is often said to have a white "eye stripe" in alternate plumage. In fact this species has a black eye stripe, which is the stripe running through the eye and a white supercilium, which is the correct term for the stripe which passes from the bill base over the eye and behind it. The term "back" is also confusing and open to misinterpretation. Observers who use this term are often referring to the whole upperside of the bird including the wings, when in actual fact the back is a relatively small area between the mantle and the rump. It is important to learn the various topographical terms so that their accurate use removes any ambiguity in the description.

Part 2 of this article will deal with plumage topography in much greater detail and discuss how this information can be used in describing rare birds. ✱

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