

HOW THE MISSOURI BIRD RECORDS COMMITTEE WORKS

The purpose of this article is to place the Missouri Bird Records Committee in a national context, to describe the process that it follows in making its decisions, and to provide readers with some idea of the factors that come into play as the Committee votes on a record. My hope is that all ASM members, and all other birders who are involved in documentation of records, can read through this and feel that they are really “on board” with the idea of a records committee and “up to speed” on its procedures.

Historically, birders have contributed a great deal to the science of ornithology, and that contribution has grown apace along with the popularity of birding. Scientists, however, have to be skeptical of data that have not undergone some form of validation; my mere assertion that I observed a rare species should not be taken as a fact for the permanent record without someone else’s objective judgment of the evidence. Of course, if I care only about my own list, then outside validation doesn’t matter, but it matters a lot if I want my observation to mean something to others and to be taken seriously as a piece of a larger picture. This is especially true in birding, where enthusiasm and excitement run high, and it can be easy to convince yourself that what you saw just had to be that rare species described in the book, or the one that somebody else reported yesterday.

The idea of forming a committee to review unusual bird reports started in the 1970’s in California (often a national leader in ornithological matters) and spread from there to other states. Currently every state of the union has a records committee. They all have the same purpose and operate in the same general way, but with variation in the details, beginning with the number of members. Missouri’s committee, which got started in 1987, has a membership of seven, which is about average. Terms are four years in length and are staggered, so that two members complete their terms in each of three successive years, and then the seventh member’s term is up in the fourth year. Each time a term is about to end (i.e., every year) there is public notice of that fact and new nominations are solicited. Unlike some states, Missouri does not have any term limits; this means that the same member may be re-elected for a number of terms. This has lent stability and consistency to the committee, though over time there has been a reasonable degree of turnover as people move away or simply rotate off.

As stated in the Committee’s by-laws, it reviews reports of any species that is sufficiently rare, either statewide or in the part of the state where seen (mostly those that are marked “casual” or “accidental” in the Annotated Checklist of Missouri Birds), as well as reports that are unseasonable or otherwise unusual. There is a Review List, maintained at www.mobirds.org (the ASM web site), that names all the species that always need documentation anywhere in Missouri, or in certain sections of the state. In addition, certain species are reviewed for Christmas Bird Counts and the North American Migration Count; the compilers are aware of these. In any case of doubt as to whether documentation is needed, please contact the Secretary for an opinion on this sometimes gray area.

As a great many Missouri birders know from experience, the process of documentation begins with filling out a form, which is now to be found on line—in fact, the whole process is now electronic. The form asks for information on a number of important points: a description of the bird, of course, but also the lighting, the optical equipment used, the observer's experience with that species, the reason for documenting, etc. The starting point is found at www.mobirds.org under "MBRC." It is often a good idea to write your description out elsewhere at leisure and then either re-type it or cut and paste it into the doc form, so that you aren't under pressure from the time limit. You can also upload any photographs or field notes you have as long as they are in the right format and under the file-size limit.

Once the observer has completed the "doc", it goes to a secure site where the secretary sees it first. It is given a number that includes the year it reached us and the order in which it arrived (e.g., 2012-41, for the forty-first record to arrive in 2012), and is sent to another page where it resides temporarily with other recent docs. After a reasonable number of these have accumulated, the secretary notifies the other members in an email that lists those records, and they begin their review of that batch.

Voting works like this: A member who reads a record for the first time is to consider it and decide whether to accept it or not, without discussing it with other members of the committee. The member will use his or her own knowledge base, personal ornithology library, and any other resource available to decide whether the species in question is (a) correctly identified, and (b) a naturally-occurring bird. Usually (a) is the only issue, but sometimes (b) comes into question, as with the Smew record of 1999, or the Chaffinch of 2005. The member then sends the secretary a return email with each record marked as accepted or not. If the member accepts the record, no special comment is required; if not, the member must give reasons. In the case of a potential first state record, evaluation comments are required either way.

How does a member decide whether to accept or not? Certainly the first order of business is to look for a clear description of the bird, including the important field marks that separate it from similar species. (Obviously, this is where the member needs to have a strong knowledge of bird identification, plus access to references.) The observer's description doesn't have to be technical, but some basic correct vocabulary certainly helps, like breast vs. belly, primaries vs. secondaries, or streaks vs. spots. It also helps if it is thorough, including as many details as the observer managed to notice, even those that don't seem to matter because they aren't emphasized by field guides. There are, indeed, times when only a very detailed description will suffice, requiring some technical language as the only clear way of explaining what one saw—e.g., describing the various wing feathers on a gull or a shorebird—but more often, all that's needed is a good careful down-to-earth account.

The key word in that last sentence is "careful." Example: Suppose you were on the committee and trying to evaluate a record that said, "This bird was a flycatcher that was gray and yellow underneath." This sentence does offer some specifics—the observer apparently knows what flycatchers look like—but it still leaves out more than it tells:

gray where? yellow where? how light or dark? other markings? etc. You'd feel a lot better informed if it said, "This flycatcher was a very pale unmarked gray on the throat and breast and pale yellow on the belly, with a vague, blurry separation between the colors." This is still non-technical but a lot more precise, displaying much more careful observation—and also, by the way, suggesting that the observer had made a really good find for Missouri! To prepare for the possibility of finding and describing a rarity, it's a good idea to practice this kind of accurate description on any bird, by yourself or with your friends.

Subtext is important, too: Does the observer appear to understand the significance of the sighting? Does she seem aware of why it's unusual, what the possible identification pitfalls might be, and what she was supposed to be looking for? Is he including all the details he was able to see, and only those details? Or, on the other hand, does he seem to have consulted a field guide and is now listing features in hindsight, as prompted by the book's description? The committee member must strive to "listen" to the observer in this way and judge whether the whole account adds up.

Here's an example that comes up every so often. A description might say, "The bird was about 12 inches long," but with no indication how the observer knew that. Did he sneak in close and hold a ruler up to the bird? This kind of statement gives the impression of coming straight from a field guide. Or, in a similar vein, "The bird was a little smaller than a Killdeer." If it is not made clear that there was a Killdeer a few feet away for direct comparison, how did he know? Yes, a statement of comparative size is very important, sometimes crucial, but the writer needs to say explicitly how he made the estimate. A comparison with one's memory of a Killdeer is not the same as comparison with an actual Killdeer! Once again, "careful" and "accurate" are the operative words.

Timeliness and the existence of field notes affect a reviewer's judgment, too. If you think you are seeing an unusual bird, take notes, even if you have to scribble them in your field guide or on the back of your hand. Observe all you can first, of course, but then get some notes down quickly, either while the bird is still in view or as soon afterwards as possible, while your memory is fresh and (preferably) before you consult your field guide. Later these will form the nucleus of your written account. If you don't have a camera, you should also try making a sketch or two of what you're seeing. Your level of artistic skill doesn't matter as much as a simple indication of the marks you saw and where they were on the bird. As mentioned above for your descriptive skills, it's also possible to improve your sketching skills with practice.

If you do have a camera, by all means take pictures. Even a poor, fuzzy shot may reveal important features that will clinch an identification. With a very tricky, subtle identification, photographs may be the only means of being certain—and the trickier it is, the better the photographs need to be. Thanks to the digital revolution, far more people are taking good pictures these days (smart phones may capture quite a good image) and thus, overall, more birds are getting documented successfully. Be sure, however, that you still take notes and write up your observation just as carefully even if you have pictures to submit. As useful as they are, photographs can also mislead, or leave important points

unclear. Your own description of the bird, the circumstances, and the comparisons you made with other birds can serve as a useful supplement to the pictures or, in some cases, can supersede them—and you probably won't know until later. This depends, of course, on the species and the problems involved. If you are documenting a Roseate Spoonbill, a fuzzy picture and a simple, brief description will do the trick, but if it's an Arctic Tern, both the photos and the description will need to be as sharp and detailed as you can possibly manage.

Once the observation is over and you have some notes, make an effort to turn them into a written account and submit the documentation as soon as possible. The committee can't help being skeptical of a record that isn't documented until weeks or months afterwards, no matter how great the details sound. This is even truer if there is no sign of field notes taken on the spot. On the other hand, if you do have notes or a journal entry from the day of the observation, and you just didn't realize that the bird needed to be documented, then by all means do go ahead and submit, even if it's late.

What does it take for acceptance? In Missouri, a record is accepted on a vote of 7-0 or 6-1, whereas a vote of 2-5 or less means that the record is not accepted. In between, if the vote is 5-2, 4-3, or 3-4, the record is automatically recirculated for a second vote. Occasionally, the secretary will decide to recirculate even a record that met the "accept" standard if one member has given persuasive reasons for doubting it—or, conversely, to recirculate a failed record if someone has made a strong case for it. One of the virtues of a committee, as opposed to a single "guru" who judges all records, is that the various members will notice different things and see different angles, which can then be shared. On a second round, the members will see all the comments that other members made from the first round, and they are free to discuss and argue among themselves before voting. Particularly difficult records that can't be resolved by circulation are saved for the next face-to-face meeting and discussed there. At any point in the process, if the committee decides that opinions from outside experts are needed, then names are proposed, the reviews are solicited, and the record is sent to those reviewers for their written opinions, which are then circulated to all before the next vote. Outside review can take a long time but can sometimes be essential for resolving a record.

While it may seem at times that records committees are overly critical and conservative, this impression stems from a consistent philosophy: that it is of prime importance to keep the record clean and to accept only those reports that seem to be established beyond reasonable doubt. Since every committee is made up of human beings, this will never work 100% of the time, but it is still the goal. In practice, this means that while an occasional incorrect report may end up being accepted, more often a potentially correct report may be rejected for lack of key details or the clear elimination of all similar species. A vote not to accept often means that the members thought the identification might have been right but was not established firmly enough.

At the end of each record year, running from December to December, the year's results are compiled into an Annual Report, which gives some key details about every accepted record, including observer, date, location, and why the record is significant

(e.g., the species is casual in Missouri). For records not accepted, the observer's names are omitted, and the report attempts to summarize why the committee voted not to accept. In recent years, anywhere from 70 to 100 records have been submitted annually, and the acceptance rate has been averaging around 85%. The Annual Report is published in the March issue of the *Bluebird* and also on the ASM web site (go to "Annual Reports"). It can also be very interesting to go to other state organizations' sites and read the reports from their records committees.

Finally, it is the committee's responsibility to make sure that all records, accepted or not, are archived permanently so that future committees can reexamine them and reconsider decisions if necessary, and so that the evidence behind all unusual occurrences in Missouri is available to anyone who wants to study it. Presently, our records are archived in the Museum of Natural History at the University of Kansas in Lawrence, one of the premier American repositories of bird specimens and data.

The MBRC, and the secretary in particular, try to make this whole process as user-friendly as possible, and to keep relations between our committee and the rest of the Missouri birding community as cordial as possible, even though we have to disappoint some folks on occasion with a negative decision. We're all Missouri birders ourselves, and we are simply trying to help make our state's ornithological record as solid and trustworthy as we can. One implication of this is that committee members themselves are expected to document their own unusual finds—i.e., submit to the same review as all other observers. In the long run, this kind of thorough peer review will maintain a highly reliable database of unusual bird records for our state, and will also keep Missouri's birding community and its standards in high national regard.

Bill Rowe, Secretary
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