



Maryland/District of Columbia Records Committee

Goals and Procedures

Revised February 27, 2004

Part 1. Introduction and General Information

1.1 Document Scope

This document defines the goals and procedures of the Maryland/District of Columbia Records Committee (MD/DCRC).

1.2 Document Objectives

This document was developed to satisfy the following objectives:

1. To communicate why the Maryland Ornithological Society established the MD/DCRC.
2. To define the committee's organizational foundation.
3. To document the committee's operational procedures.
4. To provide guidance to committee members for evaluating submitted reports.
5. To articulate the major criteria for accepting or not accepting reports.
6. To enable interested persons to fully understand the aims, operations, and procedures of the committee.

1.3 Document Organization

This document is organized in eight parts:

- Part 1 Introduction and General Information
- Part 2 Charter and Goals
- Part 3 Committee Organization
- Part 4 Operational Policies and Procedures
- Part 5 Publications and Information
- Part 6 Document Change Process
- Part 7 Literature Cited
- Part 8 Contacting the Secretary

1.4 MD/DCRC Web Site

Additional MD/DCRC information can be found on the committee's web site:

<http://www.mdbirds.org/mddcrc/rcindex.html>

Part 2. Charter and Goals

2.1 Charter

The MD/DCRC, a standing committee of the Maryland Ornithological Society (MOS), was chartered as the MOS Records Committee in late 1982. Coverage, originally limited to the state of Maryland, was broadened in 1990 to include the District of Columbia. At that time, the committee's name was changed to the Maryland/District of Columbia Records Committee.

2.2 Purpose

The purpose of the MD/DCRC is to convert sighting reports of rare and unusual birds in Maryland and the District of Columbia into authenticated records and information that can be reliably used for scientific studies, such as determining species distributions and patterns of avian vagrancy.

2.3 Principal Goals

The MOS has charged the MD/DCRC to:

- a. Review reports of unusual ornithological sightings within Maryland and the District of Columbia and determine the adequacy of the documentation of submitted reports
- b. Maintain an Official List of the Birds of Maryland
- c. Maintain an Official List of the Birds of the District of Columbia

2.4 Additional Goals

Complementary goals of the MD/DCRC are to contribute to the science of ornithology by:

- a. Publishing periodic findings reports
- b. Maintaining an information repository, consisting of:
 1. Submitted reports
 2. The deliberations of the Committee
 3. Opinions received from outside experts
 4. Copies of some of the relevant literature

Part 3. Committee Organization

3.1 Committee Composition

The MD/DCRC consists of a Chair, a Secretary, and voting members.

3.2 Chair

3.2.1 Duties

The duties of the Chair are to oversee the workings of the Committee, to function as its spokesperson, and to consult as need arises with the Secretary and the members of the Committee.

3.2.2 Term

The term is for one year, but the Chair may succeed him or herself and serve successive terms.

3.2.3 Election

The voting members elect the Chair at the Annual Meeting.

3.2.4 Constraints

The Chair should be either a present or past voting member of the committee. The Chair need not be a current voting member of the committee.

3.3 Secretary

3.3.1 Duties

The duties of the Secretary are to maintain the committee reports and records, facilitate the circulation of reports, manage and archive the accumulated data, handle committee correspondence, and other tasks as agreed between the Secretary and the Chair or the individual members.

3.3.2 Term

The Secretary serves a one-year term; however, Secretaries are encouraged and expected to serve multiple terms.

3.3.3. Election

The Secretary is elected each year at the Annual Meeting.

3.3.4 Replacement

If a vacancy arises in the position of Secretary, the Chair, in consultation with the members, will identify and appoint a replacement until a candidate can be formally elected at the next Annual Meeting.

3.3.5 Constraints

The Secretary shall not be a voting committee member.

3.4 Voting Members

3.4.1 Composition

The MD/DCRC consists of nine voting members.

3.4.2 Duties

The primary duties of a voting committee member are to review, evaluate, and vote on submitted sighting reports. Members are encouraged to further contribute to the MD/DCRC by volunteering to assist with research or special projects.

3.4.3 Terms

Members serve three-year terms arranged so that each year, three members complete their terms and are succeeded by three newly elected members.

3.4.4 Election

New members are elected by the current members at the Annual Meeting. If a member vacates prior to the completion of his/her term, the Chair will appoint a replacement member to complete the remainder of the vacated term.

3.4.5 Constraints

A member may not be reelected for successive terms, but may be reelected after not serving as a voting member for at least one year.

3.5 Administrative Voting

The Chair and Secretary do not vote on record acceptance (unless the Chair is also an elected voting member); however, the Chair and Secretary can vote on all other committee administrative and business matters.

3.6 Meetings

3.6.1 Annual Meeting

The committee holds at least one Annual Meeting, typically in February.

3.6.2 Skins Workshop

Generally, the committee also holds an annual Skins Workshop at the Bird Division, National Museum of Natural History, Smithsonian Institution, to provide members with an opportunity to examine and discuss bird study skins and other material relevant to committee reports or records of interest.

3.6.3 Attendance

The meetings and workshop are an important part of the committee's function and all members are encouraged and expected to attend.

Part 4. Operational Policies and Procedures

4.1 Taxonomy

The MD/DCRC follows the current taxonomy accepted by the American Ornithologist's Union (A.O.U.). The A.O.U. Check-List of North American Birds, including applicable supplements, provides the common names, scientific names, and species ordering to be used by the committee. The current version of this Check-List is indicated in the "Literature Cited" section at the end of this document.

4.2 Jurisdictions

The committee's purview includes Maryland (23 counties) and the District of Columbia. For the committee's purposes, Baltimore City is considered to be a portion of Baltimore County.

4.2 Pelagic Boundaries

The Committee has adopted the following as the pelagic (open waters) boundaries of Maryland: Due east of the Maryland/Delaware/Atlantic Ocean border and due east of the Maryland/Virginia/Atlantic Ocean border, each for a distance of 200 nautical miles; and the border that connects those two points. The MD/DCRC considers all sightings within this pelagic zone to be associated with Worcester County, Maryland.

4.3 Reviewable Species

The MD/DCRC reviews and publishes decisions of sighting reports for the following indicated species:

4.3.1 MD and DC "First" Species

These are species that do not appear on the MD/DCRC's Official List of the Birds of Maryland and the Official List of the Birds of the District of Columbia – species that have not previously been documented or accepted. Such species may also include AOU area or North American "firsts" that do not appear in the AOU Check-List.

4.3.2 Unusual Species

The MD/DCRC maintains and periodically publishes a Review List of unusual species rarely documented or accepted in the areas of coverage. Reports of species on this list are encouraged from field observers. In Maryland, species may be reviewable either on a state-wide basis or within specific ranges as defined in the Review List.

4.3.3 Unusual Forms

The committee is also interested in reviewing well-marked, field-identifiable forms or subspecies that are of unusual interest for the areas of coverage. Examples of previously accepted forms and subspecies are shown on the current Official Lists.

4.3.4 Species of Questionable Origin

Species of questionable origin (i.e., species that may not be wild or naturally occurring) should be documented by observers and submitted to the committee for review. Doing so will enable the committee to maintain historical records on such species to help identify or determine patterns of vagrancy or the establishment of introduced species within the areas of coverage. Examples of such species typically include Barnacle Goose and Monk Parakeets. With these species, the birds' origin may be natural or wild or may be escapes or releases from captivity. Since patterns of vagrancy and the establishment of local populations do change over time, collecting documentation of such species is of value to the committee. It is possible; however, that reports of some of these species may be held for

review at a later time until more information is available on vagrancy patterns or the establishment of local populations.

4.3.5 Species of Exotic Origin

Exotic species are those whose natural history precludes wild or natural occurrence in the areas of coverage. An example of such a species is Black Swan, whose flight capabilities and patterns of vagrancy all but preclude anything except release or escape from captivity. For such species, the committee will review at least one of each from the areas of coverage; however, subsequent sighting reports may be maintained in the MD/DCRC's data repository, but may not be reviewed. Species of exotic origin are typically not listed in the A.O.U. Check-list or its Appendix Part 1.

4.3.6 Doubtful Forms or of Hybrid Origin

The A.O.U. Check-list Appendix, Part 2, is a listing of "doubtful forms" and hybrids that have been given formal scientific names. Species of the "doubtful form" types would be extraordinary and the committee will review such reports. Hybrid species; however, would be of interest to the committee only if the range of one or both of the hybrid's parents were unusual for the area of coverage. For example, Lawrence's Warbler and Brewster's Warbler hybrids are not unusual for Maryland or DC; however, Nelson's Gull (Herring x Glaucous Gull) would be notable. If observers are unsure of the review status of species or hybrids while in the field, it is best to capture field notes or images and check later with the committee.

4.4 Sighting Reports

4.4.1 Report Submission

Reports of unusual sightings should be submitted to the Secretary. The name, phone number, postal, and email addresses of the Secretary are provided at the end of this report.

4.4.2 Acknowledgements

The Secretary will periodically send observers acknowledgments of submitted reports.

4.4.3 Documentation Guidelines

The MD/DCRC maintains a documentation checklist/set of guidelines on its web site that illustrates the type of information that is requested in a submitted report.

4.4.4 Second Hand Reports

The committee will not review reports from observers that were submitted indirectly (that is, via another party) without the expressed permission of the original observer. In such cases the committee shall seek the permission of the observer and ask the observer if any additional relevant information is available before using the original information for review purposes. This policy is especially relevant to descriptions from bird counts and messages taken from the Internet.

4.4.5 Multiple Versus Single Records Policy

The Secretary will organize sighting reports into contiguous blocks of time that are indicative of the period when a bird or flocks of birds were within a jurisdiction (Maryland or DC). Specifically, reports of wintering birds returning for multiple seasons (such as when indicated by banding data) will be considered as one report for each season that bird is present.

4.4.6 Additional Information

In addition to observer-submitted reports and references, other information may be obtained and considered during the review of a report. Examples include:

4.4.6.1 Outside Expert Opinions

MD/DCRC outside reviews fall into two categories. The first case involves species that are generally little known or unknown to the committee membership (such as the original DC Yellow-legged Gull). In these cases, the Chair and/or Secretary will solicit outside expert opinions before the report is placed into review. In the second case, for species regularly occurring in North America, members may raise identification questions/issues in their first round ballot comments and state if they wish that an outside expert opinion be sought and suggest one or two suitable outside experts. The Chair or Secretary will then request and arrange for this type of review.

4.4.6.2 Reference Material

Members are encouraged to provide copies of articles on identification of difficult-to-separate species and other relevant subjects, such as distribution or vagrancy, for inclusion in circulating packages. During the first round, members are encouraged to submit articles and other relevant references to the Secretary for inclusion in subsequent rounds.

4.4.6.3 Solicitation of Additional Information

A member may decide that some observer information details are lacking in the original submission that might be helpful in arriving at a decision. However, it has been the experience of the Committee that soliciting additional observer details of plumage, structure, etc., well after an original observation, does generally not produce useful information. It is suggested that any additional information solicited should generally be limited to objective matters, such as type of optical equipment used; lighting conditions; names and addresses of "other observers"; existence of copies of original field notes; etc. However, individual members are always free to contact observers and solicit additional information. Any information gained should be incorporated into the member's ballot comments or sent to the Secretary for inclusion in the next circulation. If new information is gained by the first reviewer of a package, this new information can be included in the review package since all of the other members will see the information as the package circulates.

4.4.6.4 Internet and World Wide Web Information

The Committee will not review sighting report information published on the Internet/world wide web without the consent of the author. Identification, taxonomy and distribution reference material from Internet sources may be used for Committee deliberations with discretion, recognizing that most of the material on the Internet is not peer-reviewed.

4.4.7 Reopening of Reports

Previously accepted records or not-accepted reports may be reopened for review. Reopened reports are circulated in the usual manner and follow the standard voting processes, as though each were a first circulation. The original circulation file and any new additional information will be included in the reopened file. Records can be reopened via either of two processes:

4.4.7.1 Consensus Reopenings

Any committee member can request that a record be reopened, but must provide a justification for the re-examination request. The Secretary will then submit the request

and the record file to the entire committee for members to vote "yes" or "no" as to whether the record should be reopened. Typically, this procedure is conducted at the Annual Meeting. Agreement of a majority of the voting committee members is required to reopen a report. When reports are reopened via this consensus method (a petition by at least five voting members of the committee), it is expected that one or more of these members will serve as the "advocate" for reopening the report and prepare a summary of the arguments that support the reopening.

4.4.7.2 New Evidence Reopenings

If new evidence surfaces in the form of additional original observation documentation, new photographs, new patterns of vagrancy, or other relevant material from any source, the report/record can be reopened by the Chair.

4.5 Review Packages

4.5.1 Package Circulation

Reports are assigned a unique number and are circulated serially to the committee members in groups as a "package".

4.5.2 Frequency and Size

Packages are circulated periodically, usually with a minimum of four weeks between packages. Packages consist of 10 to 15 reports, mixed between first circulations and recirculations. In the case of fourth circulations, a special package will be circulated consisting of the fourth-round report(s) that were discussed at the previous Annual Meeting.

4.6 Voting Procedures and Policies

4.6.1 Voting Process

Packages should be processed by each voting member within two weeks of receipt and then mailed to the next or another member on the circulation list. Completed Vote/Comment forms are to be sent to the Secretary at the same time. Members will be monitored on the average time it takes to process packages. If a member's average exceeds 2.5 weeks between annual meetings (barring extenuating circumstances), the member will be replaced. The Secretary will contact members who delay processing for three weeks. Members who expect to be away for more than two weeks at a time should advise the Secretary and the other members so that packages can be re-routed.

4.6.2 Comments

Members are encouraged to provide written comments for each vote, detailing the reasons for their vote. These comments provide information to other members during subsequent circulations, are used by the Secretary when notifying observers of Committee decisions, and, can be useful to interested persons who wish to research the reasoning underlying committee decisions.

4.6.3 Discussions

Members should not discuss first circulation reports with other members before they vote. However, to help minimize repeated recirculations, members are encouraged to discuss reports after the first round of voting has been completed.

4.6.4 Acceptance Criteria

The following factors are relevant to the decision process:

a. Confidence

In voting on the correctness of identification, each member should seek a high level of confidence in his or her own mind in order to vote affirmatively.

b. Consistency

Members should strive to judge each report with the same stringency and with uniform rigor. Use of a "sliding scale" as the number of records of a given species increases is discouraged. One aim of this practice is to minimize circularity of reasoning.

c. Documentation

At least minimal documentation is required for a report to be acceptable. Documentation may include specimens, photographs, videotapes, tape recordings, drawings, banding or measurement data, and/or written descriptions.

d. Specimens/Photographs Only

A specimen, photograph, etc., unaccompanied by a written description, may be considered as the sole documentation provided that date, locality, and photographer/submitter are specified.

e. Written Descriptions

A written description unaccompanied by further evidence may also be satisfactory as the sole documentation. A recognizable photograph will almost always strengthen the evidence. Drawings or sketches are generally helpful.

f. Single Observer Reports

Documentation submitted by a single observer, even unaccompanied by photographic or other objective evidence, may be sufficient to gain acceptance for a report.

g. Multiple Observer Reports

The documentation for a given report will usually carry greater weight if submissions by more than one observer are available and are in essential agreement. A statement to the effect that a bird was seen by one or more additional observers (named or unnamed) confers no added weight to the evidence, unless the additional observer attaches at least a minimal statement about his/her own observations or his/her agreement with the statements in the original submission. Generally, added weight becomes a function of the independence with which each submission is prepared.

h. Voting Considerations

When evaluating a report, in addition to evidence about the bird itself, members of the committee generally consider other matters. A "mix" of considerations is used by each member in arriving at his or her decision and will vary from report to report. Different members may well use different "mixes" for a given report. It is hoped that the committee membership represents a balance of diverse backgrounds, experiences, and points-of-view. For these reasons members are encouraged to give indications in their comments as to which factor(s) they considered especially critical. Comments about observer experience, reliability, and whether allowance should be made for writing skills are important since such comments will permit future reviewers to be better informed about these matters on the basis of the first-hand experience of the observer's contemporaries. Typical considerations may include the following:

- (1) The ease of identifying the species.
- (2) The conditions of the sighting: distance, lighting, optical equipment used, etc.
- (3) Whether field notes and/or sketches were made prior to consultation with field-guides or other birders present, etc.
- (4) Unusual weather patterns that may have contributed to the arrival of a vagrant.
- (5) A pattern of vagrancy or distribution of the species in question in the region.
- (6) The experience of the observer in general and with the species under consideration in particular.
- (7) The reliability of the observer, and his or her ability and experience in writing a clear, accurate, and precise description, in so far as these factors are known to the members.
- (8) Other considerations deemed relevant by the members, such as the possibility of the bird in question being an escape or hybrid.

i. Species Familiarity

Each member is encouraged to include in his or her comments some indication of his/her own familiarity with the species in question. This may help others to evaluate the vote and comments of that member.

4.7 Voting Process

4.7.1 Abstentions

Members may not abstain and must vote on all reports, including those containing their own documentation.

4.7.2 Voting Options

Voting options as to correct identification are:

- 1) Accept (as a species)
- 2) Accept-Form (or subspecies)
- 3) Accept-Group
- 4) ID OK/?? Origin
- 5) ID OK/?? Exotic
- 6) Not accepted

4.7.2.1 Accept

This vote indicates that the member agrees with the species identification as submitted.

4.7.2.2 Accept-Form

If an unusual form or subspecies is the subject of the review, this vote will apply to the subspecies as submitted (for example, "Gambel's" White-crowned Sparrow). This vote indicates that the member agrees with the form or subspecies identification as submitted.

4.7.2.3 Accept-Group

A report may be submitted and reviewed even when the submitter deems the evidence sufficient only to identify the bird as a member of a particular group, such as a genus or a defined complex of species. Such reviews or votes can apply only when all species comprising the indicated group are reviewable in the area of coverage. For example, *Fregata* sp., *Uria* sp., *Cephus* sp., or *Selasphorus* sp. would all be suitable for submission and review as members of genus-defined groups because all frigatebirds, all guillemots, all murrelets, and all *Selasphorus* hummingbirds are subject to review in the area of coverage. However, *Myiarchus* sp. would not be a valid review group because Great-crested Flycatcher (*Myiarchus crinitus*) is not reviewable in the area of coverage. "Rufous/Allen's/Broad-tailed/Calliope Hummingbird" would be an example of a multi-genus group defined by a complex of species. As another example, if observation details can eliminate Pomarine Jaeger from consideration, then "Parasitic/Long-tailed Jaeger" would be an example of a complex that would be eligible for review, if seen inland. When a "group" acceptance vote is used, the voting member must clearly specify the limits of the acceptance "group" defined, since the member's definition may differ from that submitted by the observer. For example, a report submitted by an observer as a *Selasphorus* hummingbird could be accepted by a committee member under a narrower group definition if the member could eliminate Broad-tailed Hummingbird based on the evidence presented. In this case, the member could vote to accept as a member of the Rufous/Allen's Hummingbird complex rather than the entire *Selasphorus* genus.

4.7.2.4 Origin Votes

Reports are judged not only on whether the bird observed was correctly identified, but also as to its known relationship to the avifauna of the jurisdictions of Maryland and the District of Columbia; specifically on the question of whether the bird was of wild/natural origin. In the voting process, the committee decouples the questions of identification and origin. If a member votes to accept identification (either to species/subspecies, or as a group), but has questions about the origin, the member has the option of also voting either "ID OK/?? Origin" ("questionable origin") or "ID OK/Exotic Origin". The question of origin falls into three states.

4.7.2.4.1 Natural Origin

At one end of this spectrum, birds that arrive in these jurisdictions as a part of the natural processes of migration, range expansion, and occasional vagrancy are thought to be of a "wild" or "natural" occurrence. An example of a wild/natural occurrence is the sighting of a Fork-tailed Flycatcher for a brief period during the month of September – this situation is totally consistent with the pattern of vagrancy for this species.

4.7.2.4.2 Exotic Origin

At the other end of the spectrum are escaped pet birds and escapees from other collections (zoos, exotic wildfowl collections, etc.). An example of this situation might be the observation of a Black Swan on a local lake. This species is naturally found in Australia and New Zealand; is a short distant migrant; has no history or pattern of vagrancy from its normal range; and is known to be kept on farms and wildfowl collections. This situation would clearly be an occurrence of an "exotic" bird.

4.7.2.4.3 Questionable Origin

However, in between these two extremes are many cases where the obvious explanation of a bird's presence is not known or is not knowable. Seeking to rule out all possible non-natural origin situations; however, seeks to prove a negative – a logical impossibility. Possible non-natural occurrence situations could include domestic origin (e.g., hand-

rearing), caged or restrained, importation, human intervention on a ship-assisted passage, sustained by a specific feeding program, etc. For example, Barnacle Geese found in Maryland or the District of Columbia could theoretically either be naturally occurring vagrants or escapes from a local collection.

4.7.2.3.2 Origin – Degree of Confidence

If neither of the “origin” voting options is used, the assumption will be that the member deems the origin to be natural. The default assumption is that “accept (species/subspecies)” votes imply a vote for “natural origin.” The other “origin” votes should be used for cases in which there is a question of direct human assistance contributing to the bird's presence, or for species known to be held in captivity and the appearance of which at the particular location and time reported was believed not to be due to natural vagrancy. Because it may be difficult or impossible to obtain definitive evidence upon these aspects, they are inherently likely to be subject to less certain resolution than the question of identity. For this reason, the individual member is asked to hold himself or herself to a less high degree of confidence in voting on origin than on identity - a belief that origin is more likely to be natural than man-assisted should be regarded as sufficient to cause the member not to utilize either the "origin questionable" or "origin exotic" option.

4.7.3 Questions of Age and Sex

The committee reviews and accepts species, but not factors such as age or sex. That is, if a committee member finds the reported age or sex of a bird species to be an issue, the member should still accept the identification of the species. Member's comments with regard to these factors should be recorded in their ballot discussion. If such issues, however, relate to ambiguity over the presence of different birds, then these issues may be material to the acceptance voting process.

4.7.4 Voting Nomenclature

The nomenclature for publishing final votes is expressed as:

A-N-O, where

- A = number of votes to Accept the identification (either species or form/subspecies),
- N = number of votes to Not Accept the identification, and
- O = Other votes, which may represent any of the following:
 - G = Accept-Group
 - Q = ID OK/?? Origin
 - E = ID OK/Exotic Origin

The sum of A plus N plus O will always equal nine (the number of voting members).

4.7.5 Acceptance, Non-acceptance, and Recirculation

The rules of acceptance and non-acceptance are dependent on the circulation round for the record in question:

4.7.5.1 First Circulation

Reports that receive a unanimous vote of 9-0-0 are accepted without further action. Likewise, reports that receive a unanimous vote of 0-9-0 are not accepted without further action. All other reports are circulated for a second round.

4.7.5.2 Second Circulation

Reports that receive a unanimous vote of 9 0-0 are accepted. Reports that receive fewer than five favorable votes are not accepted. Reports that receive votes of 8-x-x, 7-x-x, 6-x-x, or 5-x-x are circulated for a third round.

4.7.5.3 Third Circulation

Reports that receive a vote of 9-0-0 or 8-x-x are accepted. Reports that receive fewer than seven favorable votes are not accepted. Reports receiving votes of 7-x-x are scheduled for a fourth, final circulation.

4.7.5.4 Fourth Circulation

Reports scheduled for a fourth circulation are first discussed at the next MD/DCRC Annual Meeting, and then circulated as a separate package to the incumbent members, (including those whose terms expired at the Annual Meeting in question). Other reports may also be included in this review package as agreed by the sitting committee. Incoming members do not review fourth circulation reports discussed at the Annual Meeting at which they were elected. Fourth circulation reports receiving votes of 9-0-0 or 8-x-x are accepted. All others are "not accepted" (except those only dealing with remaining questions of origin, as defined above).

4.7.6 Resolving Group Votes

When a report receives enough votes to accept, but the votes are divided between "accept (species/subspecies)" and "accept-group", the report will be circulated once more. After this circulation, the final acceptance decision will be assigned to the narrowest classification that receives at least eight votes. For example, "accept (species/subspecies)" is narrower than "accept group" based on the genus since the species is included within that genus.

4.7.7 Resolving Origin Votes

Once the identification question has been decided, then the question of origin can be resolved. For any report accepted as to identification, unless there is a unanimity of votes for one of the three categories for origin (i.e., "natural", "questionable", or "exotic"), that report will be discussed at the next annual meeting and then voted upon in a separate package thereafter. To be accepted as "origin natural", during that vote, the report must receive at least eight (default) votes for "origin natural". All other reports will be recorded without further voting as "origin questionable".

4.8 Confidence Codes

4.8.1 Background

At the 1994 MD/DCRC Annual Meeting, a subcommittee was formed to develop experimental voting "categories". This project was undertaken to deal with the fact that reports submitted to the MD/DCRC, in reality, come in a continuum of compellingness and that having ultimately to vote either to "accept or "not accept", forces these reports into artificial all-or-nothing categories. The subcommittee prepared a series of "confidence" categories, as an experiment, to evaluate in parallel with the existing voting system. Through this experiment, the committee realized that these voting confidence codes conveyed additional useful information regarding considerations in members' minds at the time of his/her vote. These confidence codes may be useful to other committee members, to interested persons now and in the future, and to the submitters of records. Therefore, at the

1999 Annual Meeting, the committee decided to make confidence code determination a standard element of the committee's procedures.

4.8.2 Procedures

In addition to votes to "accept", "not accept", etc., each member also designates into which confidence category, as defined below (A, B, C, D, E), his/her vote would most comfortably fit. For a vote in category C, members also select one or more of the subcategories, C1 through C5.

4.8.3 Confidence Categories

- A. Unequivocally correct; specimen, recognizable photo, video, or recording available as proof
- B. A compelling written report for which objective proof is lacking. This could include reports for which a photo, video, or recording, if available, was judged to be equivocal, but for which the written documentation was convincing
- C. A report that leaves questions:
 - C1. The report omits features that leave questions
 - C2. Some described features seem incorrect or conflicting
 - C3. Uneasiness with the circumstances or the timing of the observation
 - C4. Discrepancies exist between multiple observer reports
 - C5. The report was written long after the observation or after consulting field guides
- D. Report appears to be incorrect, but no unequivocal evidence
- E. Report is unequivocally incorrect, as evidenced by a specimen, photo, video, or recording (e.g., report of a Rock Wren accompanied by a photo of a House Wren)

4.8.4 Feedback

Members are encouraged to submit suggestions for new confidence categories whenever the existing ones seem inadequate for the situation.

Part 5. Publications and Information

5.1 Package Summaries

Upon completion of a package circulation, the Secretary will mail a summary to each member, indicating the committee's votes and decision on each report. Members will have two weeks to respond to the Secretary if any discrepancies are noted in the package summary.

5.2 Maryland Yellowthroat Decision Synopsis

The Secretary will periodically send a list of final decisions to The Maryland Yellowthroat editor for publication.

5.3 Maryland Birdlife Decision Reports

Periodically, the MD/DCRC will publish more detailed and scholarly articles in Maryland Birdlife to further document and discuss its decisions.

5.4 Official Lists

The MD/DCRC maintains and publishes the Official List of the Birds of Maryland and the Official List of the Birds of the District of Columbia.

5.4.1 Baselines

The MD/DCRC baselines (starting points) for the Official Lists are the following:

5.4.1.1 Maryland Baseline

The Maryland baseline is *The Birds of Maryland and the District of Columbia*, 1958, by Robert E. Stewart and Chandler S. Robbins.

5.4.1.2 District of Columbia Baseline

The District of Columbia baseline is its last Checklist of the Birds of the District of Columbia produced by the former District of Columbia Records Committee and published in the *Atlantic Naturalist* in 1985.

5.4.2 Additions to the Official Lists

Species are added to the official lists by one of the following methods:

5.4.2.1 Proclamation

This process was used twice to add species to the Official Maryland list.

Regularly Occurring Species. A number of species were not included in Stewart and Robbins when it was published in 1958; but were established as regularly occurring Maryland species when the MD/DCRC published its first Official List of the Birds of Maryland. These species were voted onto the Maryland list at the 1995 MD/DCRC Annual Meeting by a unanimous vote of the members present based on current information without need for additional review. These species included:

- Northern Fulmar
- Sooty Shearwater
- Manx Shearwater
- Audubon's Shearwater
- Razorbill
- Rock Dove
- House Finch

Trumpeter Swan. This species was also added to the Official List of the Birds of Maryland without formal written votes as an extirpated species via the proclamation process at the 1998 Annual Meeting based on research that provided descriptive evidence of Trumpeter Swans in Maryland in historical times.

5.4.2.2 First Record Acceptance

Species accepted by the MD/DCRC that are new to Maryland and the District of Columbia will be added to the Official List of the Birds of Maryland and the Official List of the Birds of the District of Columbia.

5.4.2.2.1 Record Evidence Types

For each species added to the official lists, the committee will indicate the type of evidence associated with the species records. Evidence types are:

- a. **Specimen.** An unequivocal specimen or photograph of a specimen
- b. **Photographic/videographic.** An unequivocal photographic slide, print, or digital image; or a video sequence or a still frame taken from a video
- c. **Audio.** An unequivocal analog or digital recording of the bird vocalizing
- d. **Written report.** A written report based on field notes which may also include sketches, artwork, or banding measurements

5.4.2.2.2 Record Evidence Updates

On the official lists, the committee will cite the form of evidence for each species; specimen, image, audio recording, and written reports/sketches. This is a dynamic process. For example, if the committee adds a species onto an official list based on a written report and then later accepts a photographic record, the committee will add an additional evidence type descriptor for that new documentation type. A similar change would also be made if the committee subsequently accepted a specimen record.

5.5 MD/DCRC Information Repository

5.5.1 Files and Records

The Secretary maintains the MD/DCRC report and record files, related information, and the Committee's final decisions.

5.5.2 Public Availability of Reports and Committee Deliberations

Submitted reports, as well as the deliberations of the Committee in arriving at decisions, are available to interested persons who wish to examine them.

5.5.3 Information Archives

The MD/DCRC will archive and move inactive information into MOS-provided environmentally controlled storage.

Part 6. Document Change Process

6.1 Change Procedures

The following procedures govern implementing changes to this Goals and Procedures document.

6.2 Normal Change Process

Proposed changes are normally discussed at the Annual Meeting. Members are encouraged to distribute proposed changes in advance of the Annual Meeting. However, changes may be adopted at the same meeting where they were proposed. Adoption requires the favorable votes of a majority of the members, the Chair, and the Secretary who are present at the meeting. If the general intent of a proposed change is agreed to at an Annual Meeting, but the specific language is not finalized or agreed to, the matter can be resolved via a post-meeting follow-up circulation and voting on the proposed change and final language. Voting in this situation is limited to those present at the annual meeting where the issue was discussed.

6.3 Urgent Change Process

In rare instances where a change merits immediate consideration before the next annual meeting, the proposed change may be circulated to all current members for consideration and a vote. Adoption of changes to this document under this provision requires a two-thirds concurrence of those members eligible to vote.

6.4 Minor Changes

Minor changes to this document may be implemented at any time by the Secretary and the Chair. Members will be advised of any such changes.

Part 7. Literature Cited

American Ornithologists' Union. 1998. *Checklist of North American Birds*, 7th edition. American Ornithologists' Union, Washington, D.C.

American Ornithologists' Union. 2000. Forty-second supplement to the American Ornithologists' Union *Check-list of North American Birds*. *Auk* 117(3):847–858.

American Ornithologists' Union. 2002. Forty-third supplement to the American Ornithologists' Union *Check-list of North American Birds*. *Auk* 119(3):897–906.

Czaplak, David., and Floyd. E. Hayes. 1985. Six species of birds new to the District of Columbia. *Atlantic Naturalist* 35:19-22.

Stewart, Robert E. and Chandler S. Robbins. 1958. *Birds of Maryland and the District of Columbia*. US Dept. Interior, Fish and Wildlife Service, N.A. Fauna No. 62.

Part 8. Contacting the Secretary

Sighting reports or any questions may be submitted to the MD/DCRC Secretary:

Phil Davis
MD/DCRC Secretary
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